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ABSTRACT

This curriculum guide is intended to assist business and office occupations teachers in preparing clerical and secretarial students to function in offices whose procedures and equipment are changing rapidly in the face of modern technology. Although the curriculum has been developed primarily for students enrolled in secondary-level vocational programs, some of the units are also suitable for postsecondary and adult classes. The following topics are covered in this volume of the curriculum: job search methods (sources of employment information, application forms and letters, resumes, interviews); client-related services; personal development (time management, business dress, techniques for keeping a job and setting personal goals); decision making and problem solving; and product-to-client transactions. Each unit contains unit and lesson objectives, competencies addressed in the unit, notes to the instructor, references, and one or more lessons. The individual lessons contain some or all of the following: information sheets, transparency masters, assignment sheets, answers to the assignment sheets, one or more posttests, and posttest key(s). A matrix that cross-references competencies addressed in the curriculum to Dictionary of Occupational Titles job classifications is also included. (MN)

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Secretarial Technology/ Office Technology

Volume III

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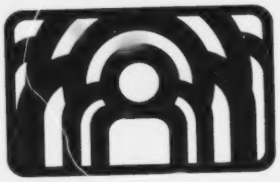

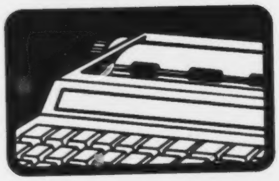

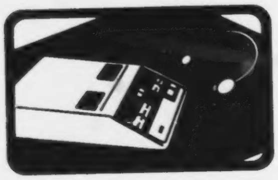

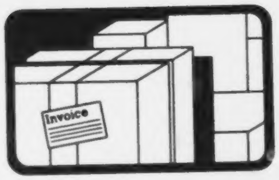

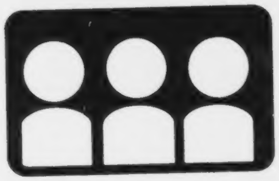

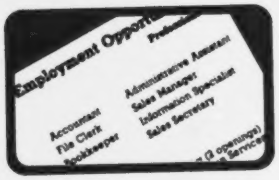
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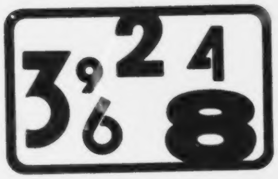
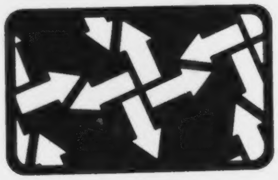
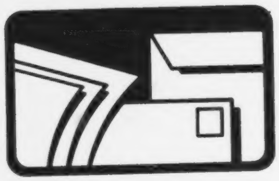
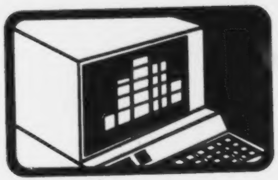
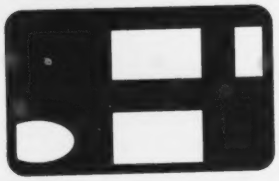
File Clerk
Bookkeeper
Administrative Assistant
Sales Manager
Information Specialist
Sales Secretary
(2 openings)
Services











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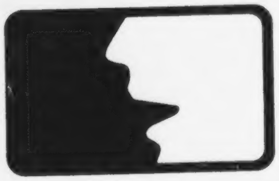

INSTRUCTOR'S GUIDE

SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

Volume III
Units X - XIV

Produced by the Instructional Materials Laboratory
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FOREWORD

Because of the many job opportunities available in the business world for properly trained business and office personnel, there is an acute need for updated instructional materials that contain current information about the procedural and equipment changes that are occuring in today's office. This three-volume guide - Secretarial Technology/Office Technology - was developed to meet this need.

The instructional materials are designed for one-, two- or three-period clerical/secretarial secondary course offerings. It was developed primarily for vocational business and office instructors in Missouri's 268 secondary local districts. However, several instructional units in the publication can be used in postsecondary and adult offerings.

The project adhered to the Missouri Vocational Instructional Management System (VIMS) in the development and organization of these instructional materials. The Develop a Curriculum (DACUM) process was used when conducting an occupational analysis for the job of clerical/secretarial to determine the competencies, duties, and tasks for this occupation.

This guide is divided into three volumes. Volume I contains the following units: Exploring Career Opportunities; Typing; Using Written Communication Skills; and Transcribing. Volume II contains the following units: Performing Internal Services; Using Oral Communication Skills; Using Offfice Procedures and Organization Skills; Using Numerical-Clerical Records; and Processing Information. Volume III contains the following units: Job Seeking; Performing Client-Related Services; Increasing Personal Development; Making Decisions and Solving Problems; and Performing Product-to-Client Transactions.

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TO HELP YOU USE THIS GUIDE

COMPETENCY-BASED INSTRUCTION

Business education instructors have used comprehensive student measurement criteria for many years, particularly in those courses that include psychomotor skills such as typewriting, shorthand, and clerical/secretarial offerings. Grades in those courses are based primarily on production ability. Students with the higher rates of production receive the higher grades. And all students are evaluated on established standards rather than on comparisons with the progress made by other students.

Competency-based instruction has become a part of the vocabulary of the educational community. Competencies and criterion-referenced measures have come into widespread use as most states have mandated minimum competency programs. While the use of competence to measure achievement is not new in education, the recent emphasis on accountability has put the spotlight on competency-based instruction.

Any program of minimum competencies should not be so broad that instructors feel that the preparation for the competencies is an overwhelming task or that many students feel it is not possible to achieve the competencies and thus lack the drive to achieve them. A great deal of planning will be required by business educators to assure the relevancy of course content with actual job profiles and consumer needs. New comprehensive recordkeeping systems that will provide more detailed data to parents, students, and businesspersons concerning pupil achievements will also be required as competency-based instructional systems are initiated. Educators are rapidly determining that they must rely upon automated electronic recordkeeping systems if adequate information for effective instruction is to be available.

The Vocational Instructional Management System (VIMS) has become Missouri's framework for competency-based instruction. There are three basic steps for implementing the system: (1) Identify your occupational program goals; (2) Prepare a job analysis or occupational task list; and (3) Write performance objectives based on the occupational task list. By following these procedures, specific employability skills and work values that should be included in the instructional program are assured. This VIMS process was utilized in the development of this curriculum guide.

Competencies are stated prior to instruction and the student knows what the basis for evaluation will be. Each student is thus held responsible for mastering the competencies. The basis for grading is attainment of competencies rather than measurement against other students. Pupils may elect to complete a full sequence of competencies in an occupational cluster, complete competencies for several specific jobs as described in the Dictionary of Occupational Titles, or a single job classification.

The suggested performance objectives for the various competencies listed in this publication are written to include three components: (1) a condition statement, (2) a performance statement, and (3) standards. Most of the objectives indicate the number of correct answers/items that should be completed in a specified time period. Some of the statements may require a higher degree of accuracy than previously required in a classroom setting, but today's businesspersons need employees who are productive and who prepare highly accurate work. Time in the business world equates cost. Students should be taught that increased production is a key factor in the American business world and unless business institutions can compete in changing economic environments and an international market, they will not survive.

Competency-based instruction lends itself to a satisfactory-unsatisfactory grading system. However, the majority of our school systems require letter grades. Since parents seem reluctant to accept anything less than evaluation based on a grading system, and since employers ask the school to differentiate prospective employees on some type of grading scale, attention must be given to some means of assigning grades.

It is recommended that most of the suggested standards in this publication be accepted as minimum qualification, and as such they should be considered in the grading process as a C letter or average grade. Those students who do not meet the established minimums should be given remedial learning activities to assist them in achieving the stated goals. Students who complete the tasks with greater accuracy and in shorter time periods should be given an A or B letter or above average grade.

Another factor to consider in the grading process is the number of competencies completed by the student. Most instructors in our state are assigned pupils for designated periods of time. Therefore, it may be necessary to establish a contractual agreement with each student about the number of competencies that will be mastered for each grading period. The overall grade should reflect the quality and quantity of work completed.

Competency-based instruction offers several decided advantages over other types of educational systems. As reflected in this publication, it describes the outcomes of programs, uses criterion-referenced measures based on clearly stated objectives, provides a sound basis for communicating with the business community, and enables students to move more rapidly in their instructional program while achieving their career goals.

SECRETARIAL TECHNOLOGY/ OFFICE TECHNOLOGY Competency/D.O.T. Matrix

	GENERAL CLERK 07.0701	CLERK TYPIST 07.0702	CORRESPONDENCE CLERK 07.0703	GENERAL OFFICE CLERK 07.0705	MAIL ORDER CLERK 07.0706	RECEPTIONIST 07.0707	SHIPPING/RECEIVING STOCK CLERK 07.0708	TRAFFIC RATE AND TRANSPORTATION CLERK 07.0709	SECRETARIAL 07.0601	LEGAL SECRETARIAL 07.0604	MEDICAL SECRETARIAL 07.0605	STENOGRAPHIC 07.0607	WORD PROCESSING 07.0608
A. Exploring Career Opportunities													
1. Analyze business and office careers	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Select a prospective career	x	x	x	x	x	x	x	x	x	x	x	x	x
B. Typing Business Materials													
1. Perform functions such as setting margins, tabs, spacing, and alignment	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Organize and type a business letter	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Type a mailable letter from copy containing proofreader's marks	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Type a memo from proofread copy	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Type business forms	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Organize and type tables	x	x	x	x		x			x	x	x	x	x
7. Organize and type business reports	x	x	x	x		x			x	x	x	x	x
8. Compose and type manuscripts	x	x	x	x		x			x	x	x	x	x
C. Using Written Communication Skills													
1. Use correct sentence structure	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Capitalize and abbreviate words in business letters	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Punctuate sentences using commas, semi-colons, and apostrophes	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Use commonly confused words and terms correctly	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Type numbers in business letters	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Type hyphens and dashes correctly	x	x	x	x	x	x	x	x	x	x	x	x	x
7. Spell words correctly in typed copy	x	x	x	x	x	x	x	x	x	x	x	x	x
8. Choose verbs which agree with given subjects	x	x	x	x	x	x	x	x	x	x	x	x	x
9. Revise sentences into complete and concise statements	x	x	x	x	x	x	x	x	x	x	x	x	x
10. Compose and type request letters	x	x	x	x	x	x	x	x	x	x	x	x	x
D. Transcribing a Business Letter													
1. Type a business letter using a transcribing machine	x	x	x	x		x			x	x	x	x	x
2. Type a business letter from office-style dictation						o			x	x	x	x	o

E. Performing Internal Services	GENERAL CLERK 07.0701	CLERK TYPIST 07.0702	CORRESPONDENCE CLERK 07.0703	GENERAL OFFICE CLERK 07.0705	MAIL ORDER CLERK 07.0706	RECEPTIONIST 07.0707	SHIPPING/RECEIVING STOCK CLERK 07.0708	TRAFFIC RATE AND TRANSPORTATION CLERK 07.0709	SECRETARIAL 07.0601	LEGAL SECRETARIAL 07.0604	MEDICAL SECRETARIAL 07.0605	STENOGRAPHIC 07.0607	WORD PROCESSING 07.0608
1. Sort and prioritize incoming mail	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Examine and route mail to appropriate personnel	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Compose and type letters of response	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Explain the zip code structure and write the two-letter state abbreviations	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Determine the appropriate class for pieces of mail	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Select the appropriate U.S. Postal Service to use for various types of mail	x	x	x	x	x	x	x	x	x	x	x	x	x
7. Type addresses on envelopes	x	x	x	x	x	x	x	x	x	x	x	x	x
8. Prepare and use a computerized mailing list to print envelopes or mailing labels	x	x	x	x	x	x	x	x	x	x	x	x	x
9. Identify filing equipment and supplies	x	x	x	x	x	x	x	x	x	x	x	x	x
10. Index, code, cross-reference, and retrieve records	x	x	x	x	x	x	x	x	x	x	x	x	x
11. File records alphabetically	x	x	x	x	x	x	x	x	x	x	x	x	x
12. File records numerically	x	x	x	x	x	x	x	x	x	x	x	x	x
13. File records alphabetically by subject and geographic area	x	x	x	x	x	x	x	x	x	x	x	x	x
14. Use a computerized filing system to initiate, file, label, and retrieve records	x	x	x	x	x	x	x	x	x	x	x	x	x
15. Describe advantages of fringe benefits	x	x	x	x	x	x	x	x	x	x	x	x	x
16. Transfer information from one record to another	x	x	x	x	x	x	x	x	x	x	x	x	x
17. Describe techniques for proofreading records	x	x	x	x	x	x	x	x	x	x	x	x	x
18. Prepare materials for reproduction	x	x	x	x		x			x	x	x	x	x
F. Using Oral Communication Skills													
1. Use effective communication skills	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Locate telephone numbers for area businesses and services	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Locate telephone area codes	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Make telephone calls to place orders or to obtain information	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Take an order over the telephone	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Take telephone messages	x	x	x	x	x	x	x	x	x	x	x	x	x
7. Make hotel and plane reservations	o			o		x			x	x	x	o	o
8. Direct visitors to appropriate offices	x	x	x	x	x	x	x	x	x	x	x	x	x
9. [illegible]ribe how to deal with irate customers	x	[illegible]	x	x	x	x	x	x	x	x	x	x	x

G. Using Office Procedures and Organizational Skills	GENERAL CLERK 07.0701	CLERK TYPIST 07.0702	CORRESPONDENCE CLERK 07.0703	GENERAL OFFICE CLERK 07.0705	MAIL ORDER CLERK 07.0706	RECEPTIONIST 07.0707	SHIPPING/RECEIVING STOCK CLERK 07.0708	TRAFFIC RATE AND TRANSPORTATION CLERK 07.0709	SECRETARIAL 07.0601	LEGAL SECRETARIAL 07.0604	MEDICAL SECRETARIAL 07.0605	STENOGRAPHIC 07.0607	WORD PROCESSING 07.0608
1. Identify the uses of types and grades of office supplies	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Select office supplies	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Decide when to use requisitions and purchase orders	x	x	x	x	x	x	x	x	x	x	x	x	x
4. List factors to be considered when ordering supplies	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Stock and organize a supply cabinet	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Clean and organize a desk	x	x	x	x	x	x	x	x	x	x	x	x	x
7. Organize a work station	x	x	x	x	x	x	x	x	x	x	x	x	x
8. List criteria for selecting office equipment	x	o	o	x	o	x	o	o	x	x	x	x	x
9. Prepare a maintenance file for office equipment	x	x	x	x	x	x	x	x	x	x	x	x	x
10. Maintain office equipment records	x	x	x	x	x	x	x	x	x	x	x	x	x
11. Analyze an office layout	o	o	o	o	o	x	o	o	x	x	x	x	x
12. Select and type a requisition for office furniture	o	o	o	o		x			x	x	x	x	x
13. Compare renting, leasing, and purchasing plans for office equipment	o	o	o	o		x			x	x	x	x	x
14. Decide whether to lease or purchase office equipment	o	o	o	o		x			x	x	x	x	x
15. Analyze whether to purchase a maintenance contract	o	o	o	o		x			x	x	x	x	x
16. Compare working for public and private enterprises	x	x	x	x	x	x	x	x	x	x	x	x	x
17. Contrast sole proprietorships, partnerships, and corporations	x	x	x	x	x	x	x	x	x	x	x	x	x
18. List items to be included in an employee's manual and a desk manual	x	x	x	x	x	x	x	x	x	x	x	x	x
19. Diagram line and staff company structures	x	x	x	x	x	x	x	x	x	x	x	x	x
20. Diagram office support structures	x	x	x	x	x	x	x	x	x	x	x	x	x
21. Analyze job descriptions	x	x	x	x	x	x	x	x	x	x	x	x	x

	GENERAL CLERK 07.0701	CLERK TYPIST 07.0702	CORRESPONDENCE CLERK 07.0703	GENERAL OFFICE CLERK 07.0705	MAIL ORDER CLERK 07.0706	RECEPTIONIST 07.0707	SHIPPING/RECEIVING STOCK CLERK 07.0708	TRAFFIC RATE AND TRANSPORTATION CLERK 07.0709	SECRETARIAL 07.0601	LEGAL SECRETARIAL 07.0604	MEDICAL SECRETARIAL 07.0605	STENOGRAPHIC 07.0607	WORD PROCESSING 07.0608
H. Using Numerical-Clerical Records													
1. Operate an electronic calculator using the touch system	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Convert fractions, decimals, and percents to equivalent forms	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Convert mathematical terms such as gross to their numerical equivalents	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Operate an electronic calculator to perform basic mathematical functions	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Complete invoices	x	x	x	x	o	x	x	o	x	x	x	x	x
6. Prepare checks, make deposits, and reconcile bank statements	x	x	x	x	x	x	x	x	x	x	x	x	x
7. Handle petty cash	x	x	x	x	x	x	x	x	x	x	x	x	x
8. Figure payroll	x	x	x	x	x	x	x	x	x	x	x	x	x
I. Processing Information													
1. Identify and describe computer components	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Describe the electronic information cycle	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Describe components of display, linear, and blind word processing equipment	x	x	x	x		x			x	x	x	x	x
4. Compare and evaluate the features of word processing systems	x	x	x	x		x			x	x	x	x	x
5. Produce and revise a document on a word processing system	x	x	x	x		x			x	x	x	x	x
6. Enter and retrieve information with a computerized filing system	x	x	x	x	o	x	o	o	x	x	x	x	x
7. Modify and correct computerized records	x	x	x	x	x	x	x	x	x	x	x	x	x
8. Enter data into a data base	x	x	x	x	x	x	x	x	x	x	x	x	x
9. Access and extract data from a data base	x	x	x	x	x	x	x	x	x	x	x	x	x
10. Design a data base	o		o	o		x			x	x	x	o	x
11. Design and use a spreadsheet	o		o	o		x			x	x	x	o	x

	GENERAL CLERK 07.0701	CLERK TYPIST 07.0702	CORRESPONDENCE CLERK 07.0703	GENERAL OFFICE CLERK 07.0705	MAIL ORDER CLERK 07.0706	RECEPTIONIST 07.0707	SHIPPING/RECEIVING STOCK CLERK 07.0708	TRAFFIC RATE AND TRANSPORTATION CLERK 07.0709	SECRETARIAL 07.0601	LEGAL SECRETARIAL 07.0604	MEDICAL SECRETARIAL 07.0605	STENOGRAPHIC 07.0607	WORD PROCESSING 07.0608
J. Seeking a Job													
1. Locate job sources of occupational information	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Compare public and private employment services	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Research a potential employer	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Complete a job application form	x	x	x	x	x	x	x	x	x	x	x	x	x
5. Compose and type a letter of inquiry	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Compose and type a letter of application	x	x	x	x	x	x	x	x	x	x	x	x	x
7. Make a telephone inquiry about an advertised job	x	x	x	x	x	x	x	x	x	x	x	x	x
8. Compose and type a letter requesting a reference	x	x	x	x	x	x	x	x	x	x	x	x	x
9. Prepare a resume	x	x	x	x	x	x	x	x	x	x	x	x	x
10. Practice interviewing for a job	x	x	x	x	x	x	x	x	x	x	x	x	x
11. Describe employment tests	x	x	x	x	x	x	x	x	x	x	x	x	x
12. Compose and type a follow-up letter	x	x	x	x	x	x	x	x	x	x	x	x	x
K. Performing Client-Related Services													
1. Describe types of service offices	x	x	x	x	x	x	x	x	x	x	x	x	x
2. List skills required in service offices	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Describe requirements for legal typing		o				x			x	x	o	o	x
4. List qualifications for becoming a notary	o	o	o	o		x			x	x	x		
5. Describe procedures for becoming a notary	o	o	o	o		x			x	x	x		
6. Describe responsibilities of a notary	o	o	o	o		x			x	x	x		
7. Type forms used in service offices	x	x	x	x		x			x	x	x	x	x
8. Compose and type a letter to a client	x	x	x	x		x			x	x	x	x	x
9. Type medical and legal documents from longhand copy						o			x	x	x	o	x
10. Type legal or medical letters from oral or machine dictation						x			x	x	x	x	x

	GENERAL CLERK 07.0701	CLERK TYPIST 07.0702	CORRESPONDENCE CLERK 07.0703	GENERAL OFFICE CLERK 07.0705	MAIL ORDER CLERK 07.0706	RECEPTIONIST 07.0707	SHIPPING/RECEIVING STOCK CLERK 07.0708	TRAFFIC RATE AND TRANSPORTATION CLERK 07.0709	SECRETARIAL 07.0601	LEGAL SECRETARIAL 07.0604	MEDICAL SECRETARIAL 07.0605	STENOGRAPHIC 07.0607	WORD PROCESSING 07.0608
L. Increasing Personal Development													
1. Prepare a time schedule for one week of office work	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Describe appropriate office apparel	x	x	x	x	x	x	x	x	x	x	x	x	x
3. Explain issues concerning proper employment behavior	x	x	x	x	x	x	x	x	x	x	x	x	x
4. Identify requirements and working conditions for office careers	x	x	x	x	x	x	x	x	x	x	x	x	x
M. Making Decisions and Solving Problems													
1. Recommend solutions for office problems	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Prepare an agenda for a business meeting		x				x			x	x	x	x	x
3. Make arrangements for out-of-town trips						x			x	x	x		
4. Prepare an itinerary		x				x			x	x	x	x	x
5. List steps for attending to office emergencies	x	x	x	x	x	x	x	x	x	x	x	x	x
6. Compose and type cover letters	x	x	x	x		x			x	x	x	x	x
7. Complete check requests	o			o		x			x	x	x	o	x
8. Type speeches from corrected copy	o	x		o		x			x	x	x	x	x
9. Prepare depositions									x	x	x	x	x
10. Prepare copy for release to the media	x	x	x	x		x			x	x	x	x	x
11. Prepare financial tables		x				x			x	x	x	x	x
12. Prepare an interoffice memorandum	x	x	x	x	x	x	x	x	x	x	x	x	x
N. Performing Product-to-Client Transactions													
1. Describe the sequence of product-to-client transactions	x	x	x	x	x	x	x	x	x	x	x	x	x
2. Complete transaction forms such as invoices, statements, and credit memoranda	x	x	x	x		x			x	x	x	x	x
3. Identify types of discounts	x	x	x	x		x	x	x	x	x	x	x	x
4. Identify types of carriers	o	o	o	o	x	x	x	x	x	x	x	o	x
5. Compare perpetual and periodic inventory systems	x	x	x	x	x	x	x	x	x	x	x	x	x

[illegible]ey: x = Needed o = Optional Blank Space = [illegible] Needed

Employment Opportu
Professiona
Administrative Assistant
Sales Manager
Information Specialist
Sales Secretary
Accountant
File Clerk
Bookkeeper
(2 openings)
Services

Seeking a Job

Unit X - Your Job Search

UNIT OBJECTIVE

After completion of this unit, the student will be able to effectively conduct a job-search campaign using letters of inquiry, application blanks, and a resume which could be utilized in the employment process.

COMPETENCIES

Job Seeking

1. Locate local sources of occupational information
2. Compare public and private employment services
3. Research a potential employer
4. Complete a job application form
5. Compose and type a letter of inquiry
6. Compose and type a letter of application
7. Make a telephone inquiry about an advertised job
8. Compose and type a letter requesting a reference
9. Prepare a resume
10. Practice interviewing for a job
11. Describe employment tests
12. Compose and type a follow-up letter

LESSON OBJECTIVES

1. Using a familiar geographic area encompassing a 30-mile radius, the student will cite 4 sources of occupational information available to applicants with 100 percent accuracy within 10 minutes.

2. Following instruction and research, the student will compare and contrast public and private employment services and cite an advantage and disadvantage of each with 100 percent accuracy within 30 minutes.

3. Given a potential employer, the student will research that employer to gather information beneficial in the job-search process with 90 percent accuracy within 50 minutes.

4. Using current information, the student will complete an application for employment in mailable form within 40 minutes.

5. Given a job title and employer's name and address, the student will compose and prepare a mailable letter of inquiry within 50 minutes.

6. Given information about a job opening, the student will compose and prepare a mailable letter of application within 50 minutes.

7. Given a newspaper job advertisement, the student will outline a telephone response and type a mailable letter of application with 90 percent accuracy within 30 minutes.

8. Given guidelines for contacting possible references, the student will compose and prepare a mailable letter within 30 minutes to a potential reference requesting permission to list her/his name in application materials.

9. Given guidelines in resume construction, the student will prepare a general resume with 90 percent accuracy within 90 minutes.

10. Given a specific position, the student will prepare a resume for the job with 90 percent accuracy within 90 minutes.

11. Given a simulated interview activity, the student will complete the employment process according to a performance worksheet with 90 percent accuracy within 45 minutes.

12. Given a description of a position, the student will list and describe, with 90 percent accuracy within 30 minutes, three employment tests which an applicant might be asked to take.

13. Following a simulated interview, the student will compose and prepare a mailable follow-up letter within 50 minutes.

NOTES TO THE INSTRUCTOR

1. Instructors will need to refer to Unit I: Typing Review for criteria to determine mailability of letters produced in Lessons 3 and 5.

2. Role-playing situations in the assignment sheets should be based on businesses relevant to the student's specific geographic area and employment opportunities available there.

3. Assignment Sheet 3 in Lesson 3 requires that the students have access to the employment section of a major city newspaper. The variety of employment opportunities presented will allow each student flexibility in selecting an appropriate advertisement even though she/he might not seriously consider moving to that city.

4. For the simulated telephone call, the ideal arrangement would be for each student to actually call the instructor who acts as the receptionist. If a telephone system is not available or if the students make their simulated calls while role-playing in pairs, one student should not be able to see the other, so that their attention is placed on the voices.

REFERENCES

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A. Allen, Jeffrey G. How to Turn an Interview Into a Job. New York: Simon and Schuster, 1983.

B. Crosswait, C. Bruce, and Wilkes, Mary. Professional Development: The Dynamics of Success. New York: Harcourt, Brace Jovanovich, 1981.

C. Grice, Charles Richmond. 15 Tips on Handling Job Interviews. Orange, CA: Career Publishing Incorporated, 1981.

D. Mauzey, Elizabeth M. Getting the Job. St. Louis: Milliken Publishing Co., 1980.

E. Popham, Estelle L., et. al. Secretarial Procedures and Administration, 8th ed. Cincinnnati: South-Western Publishing Co., 1983.

F. Sorrels, Bobbye D. Business Communication Fundamentals. Columbus, OH: Charles E. Merrill Publishing Company, 1984.

G. Thompson, Jacqueline. Image Impact: The Aspiring Woman's Personal Packaging Program. New York: A&W Publishers, Inc., 1981.

H. Thourlby, William. You Are What You Wear: The Key to Business Success. New York: The New American Library, 1980.

I. Zima, Joseph P. Interviewing: Key to Effective Management. Chicago: Science Research Associates, 1983.

II. Software*

*Software descriptions have been taken directly from the publishers and/or vendors.

A. Business and Office Job Readiness Test, 1983. For: Apple II; IIe; TRS-80 III or B&W; IBM PC.

This program is an effective way to measure students' work skills as they prepare to enter the job market. It is designed for pre-employment testing, pre- and post-business testing, and progress testing. Results are accumulated in the computer and printed out on a hard-copy profile sheet, thus providing a concise performing readout for use when evaluating skills and performance. Available from Career Aids, Incorporated, 20417 Nordhoff Street, Department K65, Chatsworth, CA 91311.

B. Filling Out Job Application Forms. For: Apple IIe; II+.

This program discusses the terms and concepts necessary for filling out job application forms. As the learner runs through the program, he/she fills out parts of the form as presented on the screen. The program has good content but is very elementary. Available from MCE, Inc., 157 S. Kalamazoo Mall, Kalamazoo, MI 49007.

C. The Right Resume Writer. For: Apple IIe; II+.

This program generates three basic resume formats: the traditional chronological resume, the creative/skills resume, the professional resume. The user inputs information as asked and then obtains a computer printout in resume format. The program is beneficial in providing students with a "working copy" of resume for editing; it cannot produce the final resume to be submitted to a prospective employer. This program has good content but is not designed for sophisticated resume development. Available from Career Development Software, Inc.

D. Strategies for Test Taking. For: Apple IIe; II+.

This program takes the learner from preparing and studying for a test through the actual skills and techniques required for successfully taking three to five of the most popular tests administered today. The program is very elementary. Available from MCE, Inc., 157 S. Kalamazoo Mall, Kalamazoo, MI 49007.

E. Successful Job Interviewing. For: Apple IIe; II+.

This program discusses the job interview as the learner's opportunity to sell himself/herself to the employer as the most qualified person for the job. It further provides the learner with tips on how to plan and implement a successful job interview. The program provides reproducible worksheets for assessment, reinforcement, and/or evaluation purposes. The program has good content but is very elementary. Available from MCE, Inc., 157 S. Kalamazoo Mall, Kalamazoo, MI 49007.

Unit X - Your Job Search
Lesson 1 - Sources of Employment Information

LESSON OBJECTIVES

1. Using a familiar geographic area encompassing a 30-mile radius, the student will cite 4 sources of occupational information available to applicants with 100 percent accuracy within 10 minutes.

2. Following instruction and research, the student will compare and contrast public and private employment services and cite an advantage and disadvantage of each with 100 percent accuracy within 30 minutes.

3. Given a potential employer, the student will research that employer to gather information beneficial in the job-search process with 90 percent accuracy within 50 minutes.

SUGGESTED ACTIVITIES

I. Instructor

  A. Provide objectives and information sheets for students.

  B. Assign Assignment Sheets.

  C. Give posttest.

II. Student

  A. Read and discuss objectives and information sheets.

  B. Complete Assignment Sheets.

  C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Transparency Master

  A. TM 1: Which Source of Job Information Is the Best?

IV. Assignment Sheets and Answers

  A. AS 1: Your Sources of Employment Information
  B. AS 2: Investigate the Company

V. Posttest and Key

INFORMATION SHEET

I. Researching Employment in a Specific Area

A. School Placement Offices and Teachers

Many employers prefer to work directly with schools to access potential employees with recent training for entry-level employment. Teachers often have knowledge of employment vacancies through advisory committee members, cooperative education training stations, and professional/personal contacts.

B. Friends and Relatives

Many companies routinely post information about job openings for the convenience and assistance of their employees. When an employee recommends an applicant for employment with that company, she/he assumes responsibility for helping the applicant be successful in that company. Recommendations from current employees also indicate they would be willing to work with the applicant.

C. Applicant Initiative

An applicant may choose to seek employment with a specific employer and initiate contact simply by "walking in off the street" to apply. If an applicant knows the type of establishment with which she/he wishes employment but does not know the names or locations of specific businesses, the telephone Yellow Pages provide a comprehensive categorical listing within a specific geographic area.

D. Newspapers and Magazines

1. Help wanted advertisements

    a. Advertisements list employers' names and contact information

    b. Blind advertisements—advertisements list a post office or newspaper box for the address or list a telephone number without the company name

2. News articles which indicate business expansions and openings are indicators of developing employment opportunities within a given area.

E. Government-Funded Employment Service

Missouri Job Service provides free statewide job placement with potential vocational counseling and testing and is funded by the state of Missouri.

F. Private Employment Services

Privately owned agencies provide personnel service for which they receive a fee. If the employer is willing to pay all the charges, the job is referred to as "fee paid." If the applicant accepts a "nonfee paid" position, the fee is paid by the applicant and is typically based upon a percentage of the first year's salary. Some employers reimburse employees after a specified length of employment.

II. Evaluating Sources of Employment Information (TM 1)

A. The U.S. Department of Labor surveyed thousands of successful job applicants concerning their sources of information for the jobs which they acquired.

B. Results of their survey:

1.	Private employment agencies	1%
2.	Public employment agencies	3%
3.	Advertisements	5%
4.	School placement services	6%
5.	Direct applicant/employer contact (asking for a job)	24%
6.	Friends and relatives	48%
7.	Other methods or a combination of those listed	13%
	Total	100%

III. Researching a Specific Employer

A. While preparing for an employment interview, an applicant should investigate the potential employer. This investigation can provide information to help the applicant determine if his/her skills and abilities are appropriate for the employer's needs as well as information which will help the applicant to best present his/her skills and abilities in a manner that will prompt the employer to offer employment to the applicant.

B. Sources of information about the employer include:

1. Chamber of Commerce

2. Your source of information about employment in the company--i.e., your instructor or school placement counselor, an employment service, a friend or family member, etc.

3. Reference materials contained in the public library

4. Public relations materials provided by the company

TM 1

Which source of job information is the best?

Advertisements

School Placement Services

Friends and Relatives

Public Employment Agencies

Private Employment Agencies

Direct Contact

(The one that helps you get the job you want!)

ASSIGNMENT SHEET 1: Your Sources of Employment Information

Directions: Complete this assignment sheet with details of the sources of employment information using a familiar geographic area encompassing a 30-mile radius. Give an advantage and disadvantage of each source listed.

Newspapers and Magazines: ______________________________

____

____

Public Employment Services:

Missouri Job Service: ______________________________

____

____

Other Agencies: ______________________________

____

____

Private Employment Services: ______________________________

____

____

Other Sources of Information: ______________________________

____

____

____

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ASSIGNMENT SHEET 2: Investigate the Company

Directions: Complete the following assignment sheet using a potential employer for your research.

Entire Company Name: ____

____

Full Company Address: ____

____

____

Type of Business Activity (i.e., ladies' sportswear manufacturer, advertising agency, plumbing contractor):

____

____

Type of Business Organization (i.e., single owner, partnership, private corporation, public corporation):

____

____

Size and Scope of Business (i.e., local office of national chain, 15 local employees; regional headquarters of national company for 8 states, 30 local employees; local company, 12 employees):

____

____

Recent History of Company (changes in products or services offered, expansions, mergers, etc.):

____

____

____

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1

1. Has the student explored all possible sources of employment information for the area?
2. Newspapers and Magazines: consider newspapers and magazines with circulation within the 30-mile radius even though they may be published outside the designated area.
3. Public Employment Services: consider any government or government-related agencies with job placement responsibilities.
4. Private Employment Services: use telephone Yellow Pages.
5. Other Sources of Information: knowing your area, use your imagination and explore all possible sources of help.
6. Has the student listed an advantage and disadvantage for each source?

Evaluation for Assignment Sheet 2

1. Is the information given by the student complete? Current?
2. What sources were used? Were any omitted?

POSTTEST

I. Multiple Choice - Circle the letter of the best answer.

1. According to the U.S. Department of Labor, most successful job applicants used the following source of employment information:

   a. friends and relatives
   b. direct applicant/employee contact
   c. newspaper "help wanted" section
   d. employment agencies
   e. the one who tells you about the job you want

2. An applicant who researches a specific employer in preparation for an interview demonstrates:

   a. curiosity
   b. too much spare time
   c. initiative
   d. all of the above
   e. none of the above

3. A newspaper advertisement in the "Help Wanted" section instructs applicants to send resumes to P.O. Box 328 in your city. This type of advertisement is called

   a. an open advertisement
   b. a blind advertisement
   c. a foreign advertisement

4. When an employee recommends an applicant for employment with her/his company,

   a. the employee indicates that she/he would be willing to work with the applicant
   b. the employee assumes responsibility for helping the applicant be successful in that company
   c. the applicant need not complete an application blank or interview
   d. both a and b
   e. all of the above

5. Janet wants to work in the office of a pediatrician, but she doesn't know the names or locations of specific offices. Janet should

   a. check the blind advertisements in a local newspaper.
   b. check a local city map.
   c. check the telephone Yellow Pages.
   d. check the Job Opportunities bulletin board at her school.

II. True/False - Write TRUE if the statement is true, or FALSE if it is false.

__________ 1. The Missouri Job Service provides placement service without charge to job applicants and employers who use the service.

__________ 2. Private employment services provide placement service to job applicants without charge but charge employers who utilize the service.

__________ 3. If a private employment service advertises a "nonfee paid" position, then no charge is made for the placement service.

III. Fill in the Blank - Answer each question by filling in the blank.

1. The nearest Missouri Job Service office is located in the town/city of __________________________.
2. Two newspapers which provide "Help Wanted" advertisements in our area are _______________________ and _______________________.
3. One company in our area which has its own personnel office is _________________________.

POSTTEST KEY

I. 1. a
 2. c
 3. b
 4. d
 5. c

II. 1. TRUE
 2. FALSE
 3. FALSE

III. Answers on these questions will vary but should reflect the job-search sources of your geographic area.

LESSON OBJECTIVE

Using current information, the student will complete an application for employment in mailable form within 40 minutes.

SUGGESTED ACTIVITIES

I. Instructor

   A. Provide objectives and information sheets for students.

   B. Assign Assignment Sheets.

   C. Give posttest.

II. Student

   A. Read and discuss objectives and information sheets.

   B. Complete Assignment Sheets.

   C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Handout

   A. HO 1: Application for Employment

IV. Assignment Sheets and Answers

   A. AS 1: Your Personal Inventory
   B. AS 2: Application
   C. AS 3: Wardrobe Evaluation

V. Posttest and Key

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INFORMATION SHEET

I. The application form serves multiple purposes:

   A. It is a record of the person's application for work with the organization.

   B. It provides information about the applicant's location and accessibility to the employer.

   C. It provides a record of the applicant's skills, knowledges, and abilities which the employer may consider in making the selection decision.

   D. It states the specific position for which the applicant wants to be considered.

II. Legal questions that should be included on application forms are those which address work experience, skills and training received, attendance, behavior, and ability to get along with co-workers and supervisors.

III. Guidelines for completing application forms include:

   A. Prepare for completing application forms by assembling:

      1. A chronological listing for all employers, complete with addresses, dates, salaries (beginning and terminating), and names of immediate supervisors

      2. A listing of at least three personal and three professional references which includes addresses, telephone numbers, occupations, employers, and length of acquaintance

      3. Social Security number

      4. Next of kin information, including addresses and telephone numbers

      5. Organizations to which you belong, offices that you have held, assignments of responsibility in which you are involved or have completed

      6. Honors you have received; dates and exact names of awards

      7. Names, addresses, and attendance dates for all schools where you have acquired formal training; degree or grade level completed

B. Much information requested on application forms will duplicate that contained on your resume. Bring a copy with you.

C. Follow directions. Read the entire application before filling in the blanks. If you cannot follow the directions on an application form, the employer may question your ability to follow directions on the job.

D. Answer every question. If one is not appropriate to you, enter "N/A" (not applicable) in the answer space to show that you considered the question. Leaving the space blank could indicate that you overlooked the question or are trying to omit information.

E. Questions dealing with race, religion, sex, age, marital status, or legal convictions are potentially discriminatory. You do not have to answer these questions but you should again enter "N/A" to indicate you have read them.

F. Should salary expectation be asked on the application, enter "to be discussed." Leaving the space blank could indicate that you are avoiding the issue.

G. BE NEAT!

H. Take all materials you may need so you do not have to ask the receptionist for help.

IV. The application form is another opportunity for you to communicate your abilities to an employer. If you are well prepared, your application form will reinforce your application letter and resume and reinforce your confidence as you meet the interviewer.

APPLICATION FOR EMPLOYMENT

Name ______ Last ______ First ______ Middle ______ Social Security Number ______ Date ______

Address ______ Home Telephone Number ______

City ______ State ______ Zip Code ______ Period of Residence ______

Previous Address ______ Street ______ City ______ State ______ Zip Code ______ Period of Residence ______

Position Applying For ______ When Available ______ Salary Expected ______

Have you previously applied for work with us? ( ) Yes ( ) No If yes, when ______

Referred By (Name) ______

Is there anything that would prevent you from performing the duties of the position for which you are applying? ( ) Yes ( ) No

If yes, explain ______

Are you currently under the care of a doctor? ( ) Yes ( ) No If yes, describe in full ______

Have you ever been convicted of a felony? ( ) Yes ( ) No If yes, describe in full ______

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Do you have a Driver's License? ( ) Yes ( ) No If yes, give number and state issued ______

Person to notify in case of emergency ______ Relationship ______ Phone ______

EDUCATIONAL DATA

SCHOOL	NAME	CITY & STATE	MONTH & YEAR		DEGREE OR GRADE LEVEL COMPLETED	AREA OF SPECIALTY AND HONORS RECEIVED
			FROM	TO		
Grade						
High						
College University						
Graduate School						
Trade, Business or Other						
Special Skills (List)					Typing Speed WPM	Shorthand Speed WPM

MILITARY SERVICE

Veteran of U.S.? ( ) Yes ( ) No Reserve Status ______ Draft Status ______

Armed Forces Branch ______ Serial Number ______

Dates of Duty From Month ______ Date ______ Year ______ To Month ______ Date ______ Year ______

Type of Duties Performed ______

Service Schools and other Special Training ______

This company considers all qualified applicants without regard to Race, Color, Religion, National Origin, Sex, Age, Handicap.

HO 1
AS 2

RECORD OF PREVIOUS EMPLOYMENT

(Detailed explanation may be attached to indicate any special employment experience)

PAST EMPLOYERS Company Name, Address, Phone Number	Department(s) Worked	Supervisor(s) Name	Position(s) Held	Employed		Rate Of Pay	Reason For Leaving
				From	To		

You may contact all of the above listed employers except ____________________

For Applicant's additional comments or information not covered by the Form, such as; career, interests, plans, objectives, etc. ____________________

____

This Company complies with Title VII of the Civil Rights Act of 1964 (as amended), Executive Order 11246, Sec. 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974 and Sec. 503 of the Rehabilitation Act of 1973 (as amended).

This Application will be retained in our active files for one (1) year only. If you wish to submit another application after this period of time, please feel free to do so.

I agree to abide by all the rules of the Company and will obey the orders and instructions of my supervisor. I will use and wear all safety appliances furnished me by the Company and will be careful in my work and not expose myself or other workers to unnecessary dangers.

In the event of my employment, I understand that a physical examination may be required to be passed.

It is understood that false statements on this application may result in my dismissal. I understand, also, that I am required to abide by all rules and regulations of the company.

Signature of Applicant ____________________ Date ____________________

FOR EMPLOYER'S USE (AFTER EMPLOYED)

Division ____________ Department ____________ Position ____________

Date Employed ____________ Wage and Hour Status ( ) Exempt ( ) Non Exempt ( ) Other ____________

Salary ____________ Date of Birth ____________ Marital Status ____________

Other ____________________

HO 1
AS 2

ASSIGNMENT SHEET 1: Your Personal Inventory

Directions: Using information about yourself, complete the personal inventory in preparation for your job search.

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PERSONAL INVENTORY

Full Name: ____

Street Address: ____

City, State, Zip: ____

Telephone Number: ____________________ SSN: ______________

Person to Notify
in Case of Emergency: __________________ Telephone No. _______

Position Desired: __________________ Full-Time? __________

Date Available for Work: ________________ Part-Time? _________

Minimum Acceptable Salary: ____________________ per __________

Career Goal: ____

Employment Skills: (those skills which may not have been learned but which just are "natural"--ability to work with numbers, ability to calm distraught people, skill in solving mechanical problems, etc.)

____

____

____

Machine Skills: (include machines which you can operate)

____

____

Employment Knowledges: (such as accounting, records management, computer system management, etc.)

____

____

EDUCATION:

High School	Attendance Dates	Degree or Grade Level Completed

Vocational-Technical School:	Attendance Dates	Degree or Grade Level Completed

Junior High or Middle School:

____

____

Elementary School:

____

____

WORK EXPERIENCE: (List most recent position first.)

1. Employer: ______________________________
   Address: ______________________________
   City, State, Zip: ______________________________
   Supervisor: ______________________________
   Beginning Date: ______________ Ending Date: ______________
   Beginning Duties: ______________________________
   Ending Duties: ______________________________
   Beginning Salary: ______________ per ______________
   Ending Salary: ______________ per ______________

Reason(s) for Terminating Employment:

____

____

2. Employer: ______________________________
Address: ______________________________
City, State, Zip: ______________________________
Supervisor: ______________________________
Beginning Date: ______________ Ending Date: ______________
Beginning Duties: ______________________________
Ending Duties: ______________________________
Beginning Salary: ______________ per ______________
Ending Salary: ______________ per ______________
Reason(s) for Terminating Employment:

____

____

3. Employer: ______________________________
Address: ______________________________
City, State, Zip: ______________________________
Supervisor: ______________________________
Beginning Date: ______________ Ending Date: ______________
Beginning Duties: ______________________________
Ending Duties: ______________________________
Beginning Salary: ______________ per ______________
Ending Salary: ______________ per ______________

Reason(s) for Terminating Employment:

4. Employer:

Address:

City, State, Zip:

Supervisor:

Beginning Date: Ending Date:

Beginning Duties:

Ending Duties:

Beginning Salary: per

Ending Salary: per

Reason(s) for Terminating Employment:

PERSONAL REFERENCES

1. Name: Title:

Employer:

Address:

City, State, Zip:

Telephone during Regular Business Hours:

Why can this person recommend you for employment?

How long has this person known you?

Has this person given permission to be used as a reference?

____

2. Name: ____________________ Title: __________

Employer: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

Telephone during Regular Business Hours: ______________

Why can this person recommend you for employment?

____

____

How long has this person known you? ______________

Has this person given permission to be used as a reference?

____

3. Name: ____________________ Title: __________

Employer: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

Telephone during Regular Business Hours: ______________

Why can this person recommend you for employment?

____

____

How long has this person known you? ______________

Has this person given permission to be used as a reference?

____

4. Name: ______________________ Title: __________

Employer: ______________________

Address: ______________________

City, State, Zip: ______________________

Telephone during Regular Business Hours: __________

Why can this person recommend you for employment?

____

____

How long has this person known you? __________

Has this person given permission to be used as a reference?

____

OTHER INFORMATION

School Activities, Offices, Honors:

____

____

Community Activities, Offices, Honors:

____

____

Hobbies, Special Skills, Spare-time Activities:

____

____

Activities Indicating Your Ability to Handle Responsibility:

____

____

ASSIGNMENT SHEET 2: Application

Directions: Using your personal inventory form (AS 1), complete the application form provided in this lesson as Handout 1.

ASSIGNMENT SHEET 3: Wardrobe Evaluation

The first step in image management is assessing the strengths and weaknesses in your own wardrobe. This form will help you inventory the clothing and accessories you already have so you can coordinate your future purchases to develop the image you want.

Instructions:

1. Using the inventory which you prepared earlier, list the clothing you already have which is appropriate for business wear on the form below.

2. List and indicate in the "Don't Have" column all items that are recommended but missing.

3. Evaluate each item on your list to be added or replaced and assign each a purchase priority using the following scale:

0	No need; don't want
1	Essential; purchase as soon as possible
2	Needed; shop for quality/price (i.e., sales)
3	Nice to have; put on gift list?

Category Description	Have		Don't Have	Purchase Priority
	Acceptable	Replace		
Suits				
Jackets/Blazers				
Blouses/Shirts				
Dresses				
Skirts				
Pantsuits				
Slacks				
Shoes				
Ties/Scarves				
Belts				

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1	Yes	No
1. Is the information accurate?		
2. Is the information honest?		
3. Is it complete?		
Evaluation for Assignment Sheet 2 1. Did the student follow directions in completing the application form?		
2. Is the application neat and easy to read?		
3. Was the form completed within 40 minutes?		
4. Is the information provided accurate?		
5. Is the information honest?		
6. Is the form complete?		
7. Is the form without error?		

POSTTEST

I. Identifying the Purposes of an Application Form: Circle the letter of each legal purpose of an application form.

A. It is a record of the person's application for work with the organization.

B. It provides personal information to help employers hire personnel to meet minority employment quotas.

C. It provides a record of the applicant's skills, knowledges, and abilities which the employer may consider in making the selection decision.

D. It provides information about the applicant's location and accessibility to the employer.

E. It states the specific position for which the applicant wants to be considered.

II. True/False: In each blank write TRUE if the statement is true, or FALSE if it is false.

_________ 1. An applicant must provide answers to all questions on an application form to be considered for employment--even if the questions are discriminatory.

_________ 2. Completing an application form is not part of the typical employment process.

_________ 3. Application forms should be completed in the applicant's handwriting using a ballpoint pen with black ink.

_________ 4. An applicant can expect the employer to provide writing materials, telephone directories, and other information which is needed to complete the application form.

_________ 5. When listing your employment history on an application form, you should list your most recent employment first.

_________ 6. If certain questions on an application form do not apply to you, you should leave them blank.

_________ 7. If salary expectations are asked on an application blank, you should indicate the highest possible salary for the position.

POSTTEST KEY

I. A, C, D, E

II. 1. FALSE
2. FALSE
3. FALSE
4. FALSE
5. TRUE
6. FALSE
7. FALSE

Lesson 3 - Your Letter of Application

LESSON OBJECTIVES

1. Given information about a job opening, the student will compose and prepare a mailable letter of application within 50 minutes.

2. Given a job title and employer's name and address, the student will compose and prepare a mailable letter of inquiry within 50 minutes.

3. Given a newspaper job advertisement, the student will outline a telephone response and type a mailable letter of application with 90 percent accuracy within 30 minutes.

SUGGESTED ACTIVITIES

I. Instructor

  A. Provide objectives and information sheets for students.

  B. Assign Assignment Sheets.

  C. Give posttest.

II. Student

  A. Read and discuss objectives and information sheets.

  B. Complete Assignment Sheets.

  C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Transparency Master

  A. TM 1: Plan Your Call

IV. Assignment Sheets and Answers

  A. AS 1: Writing Letters of Application
  B. AS 2: Writing Letters of Inquiry
  C. AS 3: Responding to Newspaper Advertisements

V. Posttest and Key

INFORMATION SHEET

I. Contacting the Employer by Letter

A. The First Paragraph

1. The purpose of this paragraph is to capture the reader's attention so that she/he will read the remainder of the letter.

2. Open with a thought-provoking question:

Do you need a secretary with word processing and computer skills?

3. Indicate the source of your information about the opening:

Mr. Ellis, your sales manager, told me that you will soon be hiring another data entry clerk.

WARNING: Use this method ONLY if you have the person's permission and you are confident that your information source is respected within the firm.

4. State your qualifications:

EXAMPLE: My experience as a part-time secretary and receptionist can be an asset to your new company.

B. The Second Paragraph

1. As the longest section of your letter, this paragraph should amplify your primary qualifications for this position.

2. You should refer to the enclosed resume without unnecessarily duplicating the information which it contains.

During the past two years at Our Town Career Center, I have studied information processing and my grades have averaged 3.7 on a 4.0 scale. In addition to class experience in file management systems, relational database management systems, word processing, and financial processing, I also entered the data for new students and all class schedule changes for our high school of 800 students. Part of my duties at Roberts' Clothing included preparing data forms when we ordered, received, and repriced merchandise. You can see more details about my experience and education on the enclosed resume.

C. The Third Paragraph

  1. The final paragraph should be concise and show obvious interest in an interview.

  2. Make it easy for the reader to contact you.

     May I see you for an interview at your convenience? You may call me at (816) 555-2370 any day after 3:30 p.m.

D. Meticulously evaluate your letter:

  1. Does the first glance give a good impression?

     a. Is it well placed on the page?

     b. Is it neatly typed with no erasures, smudges, or strikeovers?

     c. Is the paper of high quality?

  2. Does the second look give a good impression?

     a. Is it free from misspelled words?

     b. Is it free from errors in grammar and punctuation?

     c. Is your enthusiasm for the position evident?

II. Contacting the Employer by Phone

A. A newspaper advertisement may require a telephone response. If this is the case, plan your call before you dial. (TM 1)

B. Does the advertisement give a specific person's name to call or just a "blind" number--one without a name listed?

  1. If a person's name is listed, determine the pronunciation before you dial!

  2. If only a number is given, identify yourself and your purpose in calling. The receptionist will determine the action to be taken.

C. What is your purpose in calling? To get more information about the opening? To request an interview appointment? To request an application form?

D. Remember the general guidelines for telephone usage:

  1. Enunciate clearly; speak in a moderate rate and volume.

2. Be courteous; use correct grammar.

3. Have paper and a pen ready to note any details of the conversation, such as company address, time of interview appointment, person's name, etc.

4. Maintain an appropriate tone without too much excitement or disappointment. If the position is just what you've been wanting or if you decide during the conversation that you do not want to work for this employer, do not let your thoughts be evident in your tone.

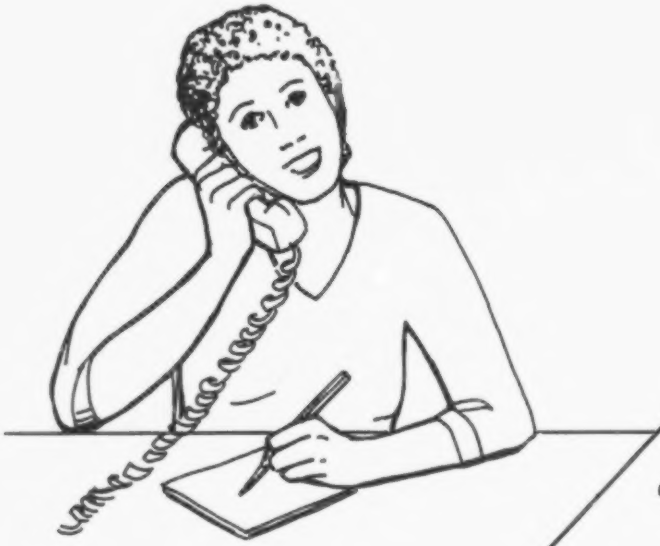
5. First impressions can be lasting. Make your first impression on the telephone a good one.

E. Then dial the number.

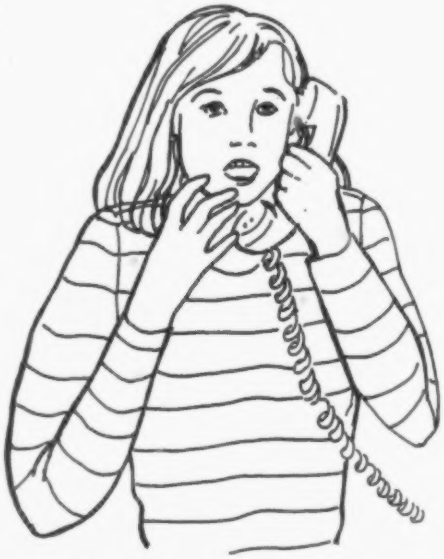
TM 1

Plan Your Call

"Good morning. Dawson Associates.
May I help you?"



"uhhhhhhhhhhhhhhh"



ASSIGNMENT SHEET 1: Writing Letters of Application

Directions: Your instructor will provide information about a job opening in your geographic area. Using that information and the data contained in this lesson, prepare an appropriate letter of application. Follow the standards for mailability.

ASSIGNMENT SHEET 2: Writing Letters of Inquiry

Directions: Your instructor will provide the name and address of an employer in your community. Using this information, write a letter inquiring if an opening exists for a position which you would like. Indicate that you want to be considered for employment for that position now if one is available or later when it becomes available.

ASSIGNMENT SHEET 3: Responding to Newspaper Advertisements

Directions:

1. Examine the employment section of a major city newspaper. Write a letter of application in response to a newspaper advertisement listing a position for which you are qualified. Submit the advertisement to your instructor with the letter you write.

2. Plan a simulated telephone call in response to a newspaper advertisement listing a position for which you are qualified. Using the guidelines provided in this lesson, make a written plan for this call prior to placing it. Submit the written plan together with any notes made during the call to your instructor.

   If time permits, you should role-play the telephone call with your instructor or another student acting as the receptionist. (Participants should not be able to see each other, so that their attention will be focused on the voices.)

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1 and 2

	Yes	No
1. Is each letter mailable?		
2. Does the first paragraph capture attention?		
3. Does the second paragraph amplify qualifications without duplicating the resume?		
4. Does the third paragraph make it easy for the reader to know how to contact the applicant?		
5. Does each letter create an overall impression which would encourage the reader to interview the applicant?		
Evaluation for Assignment Sheet 3		
1. Did the student plan the call?		
2. Was the caller's purpose clearly stated early in the conversation?		
3. Was the caller's enunciation distinct and were rate, tone, and volume appropriate?		
4. Was the caller courteous?		
5. Did the caller note the appropriate details given in the conversation: time of interview, location of interview, interviewer's name, etc.?		

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POSTTEST

I. True/False: In each blank write TRUE if the statement is true, or FALSE if it is false.

__________ 1. If the first paragraph of a letter of application does not capture the reader's attention, she/he may not read the entire letter.

__________ 2. The second paragraph of a letter of application should repeat the information contained in the applicant's enclosed resume.

__________ 3. The last paragraph of the letter of application should contain the applicant's telephone number to aid the employer in contacting the applicant.

__________ 4. An applicant should never telephone an employer without first having sent a letter of application and resume.

__________ 5. It is not appropriate to begin your letter of application with a question.

II. Multiple Choice: Circle the letter of the best answer.

1. An applicant may telephone an employer to

   a. seek information about a job opening
   b. request an interview appointment
   c. request an application form
   d. all of the above
   e. none of the above

2. In a letter of application, you should indicate the source of your information about the opening in

   a. the first paragraph
   b. the second paragraph
   c. the third paragraph
   d. the resume

3. Which of the following is not appropriate for a letter of application?

   a. a direct request for an interview
   b. mentioning your own best qualifications
   c. obvious enthusiasm for the job
   d. a personal, handwritten letter

POSTTEST KEY

I. 1. TRUE
   2. FALSE
   3. TRUE
   4. FALSE
   5. FALSE

II. 1. d
    2. a
    3. d

Unit X - Your Job Search
Lesson 4 - The Resume

LESSON OBJECTIVES

1. Given guidelines for contacting possible references, the student will compose and prepare a mailable letter within 30 minutes to a potential reference requesting permission to list her/his name in application materials.

2. Given guidelines in resume construction, the student will prepare a general resume with 90 percent accuracy within 90 minutes.

3. Given a specific position, the student will prepare a resume for the job with 90 percent accuracy within 90 minutes.

SUGGESTED ACTIVITIES

I. Instructor

  A. Obtain samples of resumes illustrating:

    1. Career objective with generalized position being sought

    2. Company-specific career objective

    3. Focus on education without work experience

    4. Focus on work experience

    5. Focus on skills

  B. Provide objectives and information sheets.

  C. Assign Assignment Sheets.

  D. Give posttest.

II. Student

  A. Read and discuss objectives and information sheets.

  B. Complete Assignment Sheets.

  C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Handout

    A. HO 1: Components of the Resume

IV. Transparency Master

    A. TM 1: What Is the Best Arrangement for Your Resume?

V. Assignment Sheets and Answers

    A. AS 1: Contacting References
    B. AS 2: General Resume
    C. AS 3: Specific Resume

VI. Posttest and Key

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INFORMATION SHEET

I. The Resume: a well-organized overview of what you have to sell to an employer--skills, education, experience--plus pertinent personal data

II. Components (HO 1)

A. Personal Data

1. Name--include your full name plus nickname if used

Michelle "Shelley" Dawson

2. Address--include full mailing address

3. Phone number(s) where you can be reached

4. By law, personal data can be required only if it is a bona fide occupational qualification (BFOQ). Under the Civil Rights Act of 1964 and its amendments, you are not required to provide any personal information on your resume which is not BFOQ.

5. Omit any data which would allow an employer to discriminate on the basis of age, sex, marital status, religion, or other nonemployment-related bases.

B. Job Objective and Career Goal

1. Indicating the specific position will focus the reader's attention immediately upon his/her needs and how you want to be considered in filling those needs.

2. A short statement summarizing your career goal can demonstrate your plan for the future as well as how employment in this position contributes to that plan.

3. If you would be willing to relocate in order to achieve your career goal or in order to obtain this job, be sure you indicate this information.

C. Skills and Abilities

1. Use active verbs:

   - achieve
   - analyze
   - apply
   - attain
   - communicate
   - compare
   - contact
   - contribute
   - control
   - coordinate
   - create
   - cut
   - define
   - design
   - develop
   - direct
   - estimate
   - evaluate
   - exhibit
   - expand
   - facilitate
   - forecast
   - guide
   - implement
   - improve
   - initiate
   - instruct
   - interpret
   - manage
   - motivate
   - negotiate
   - organize
   - oversee
   - perform
   - plan
   - prepare
   - present
   - produce
   - recommend
   - reconcile
   - reorganize
   - report
   - research
   - review
   - revise
   - select
   - sell
   - shape
   - solve
   - stage
   - supervise
   - support
   - survey
   - train
   - update

2. List all skills and abilities that you have to "sell"--even if some items do not appear relevant.

3. Be honest--don't "oversell" but don't "undersell."

D. Education

1. This information may include not only schools attended but also relevant courses taken and perhaps even grades received. Omit schools preceding high school.

2. Include dates of post-secondary education.

E. Activities, Memberships and Offices Held, Awards, Honors

1. Abilities, such as cooperation, team effort, and leadership are reflected in this section.

2. School and nonschool

F. Work History

1. Include any relevant information, such as duties and dates of employment as well as name of employer, supervisor, and employer's address.

2. Include all regular jobs that you have held even if you were terminated involuntarily or quit under unfavorable circumstances. Irregular jobs, such as babysitting, may be covered by references or in activities.

G. Hobbies, Special Interests

1. This information may relate indirectly to employment. For example, someone with an interest in needlecraft might be able to provide insight for an ophthalmologist in treating elderly patients who have a similar interest but inadequate vision to see details.

H. References

1. References are people who can give a potential employer more information about your abilities and potential contribution to his/her organization.

2. Prior to giving a person as a reference, the applicant should secure the potential reference's permission. This procedure allows the applicant to establish contact with the reference shortly before the potential employer's contact to remind him/her of the applicant's qualities and abilities.

3. If the reference gives permission but seems hesitant, the applicant should seek another reference. Obviously, an applicant does not want a reference who hesitates in making positive comments about him or her.

4. References may include former employers, co-workers, teachers, and others who have knowledge of the applicant's abilities. Remember: the higher the person's position, the more impact his/her reference may have, but an "I don't remember John's work" from the president of the company is not a positive reference!

5. References should not be members of the applicant's family.

6. A reference entry on a resume should include:

    a. Name of reference

    b. Title or occupation of reference

    c. Full address (normally business address)

    d. Telephone number during business hours

7. A reference entry on a resume may also include:

    a. Reason for selection as reference

    b. Length of acquaintance

8. Potential questions for an employer to ask a reference include:

    a. How long did the applicant work for you?

    b. What was the quality of the applicant's work?

    c. How did the applicant get along with co-workers? supervisors? customers?

    d. Did the applicant require close supervision?

    e. Was the applicant prompt? dependable? honest?

    f. Why did the applicant leave your company?

    g. Is there anything else I should know that I haven't asked?

    h. Should I speak with anyone else about the applicant?

9. Be aware that many reference queries are informal. An employer may ask anyone about a potential employee/applicant--not only the ones listed as references.

III. Format (TM 1)

A. Anyone who reads your resume should see your name, address, and telephone number quickly and easily. Make it easy for the reader to contact you for an interview!

B. The best arrangement for your resume is the one which best focuses attention on the skills, abilities, education, and experiences that you have to sell to an employer.

C. Limit your resume to one page. If you have more information than will fit on a single page, you're probably including too much "stuff"--include basic facts that are relevant to your potential employment. You may include related details in your letter of application and interview.

D. Arrange the contents of your resume in the order of importance.

1. Remember, a reader's interest must be captured early. If the content of the top half of the page does not capture a reader's interest, she/he might not read the last half.

2. If you have work experience related to the position for which you are applying, that information is more important than education and should be given sooner.

3. If this is to be your first employment in this area but you have related education, "sell" your education.

4. References are listed last.

E. Avoid supplying answers to questions which are illegal for an employer to ask.

Components of
THE RESUME

Personal Data

Job Objective/Career Goal

Skills and Abilities

Education

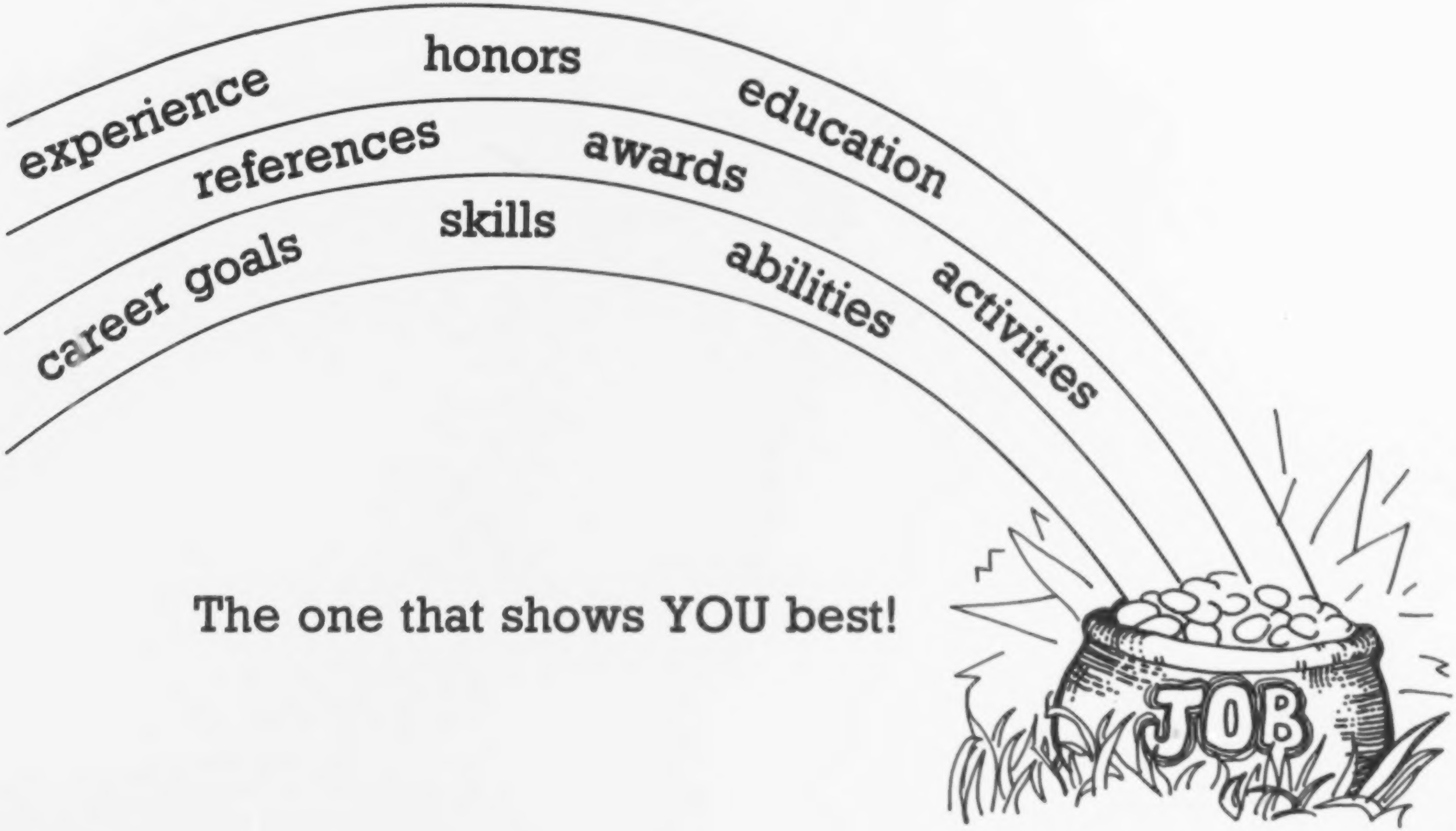
Activities/Memberships/Awards/Honors

Work History

Hobbies/Special Interests

References

What is the best arrangement for your resume?



experience
honors
education
references
awards
activities
career goals
skills
abilities

The one that shows YOU best!

TM 1

ASSIGNMENT SHEET 1: Contacting References

Directions:

1. Based on the content of this lesson, select persons you want to give as references.

2. Type a business letter to one of them requesting permission to use him/her as a reference in your job campaign.

3. Role-play a telephone call in which you request permission to list a person as a reference in your job campaign.

ASSIGNMENT SHEET 2: General Resume

Directions: Prepare a general resume appropriate for the field in which you want to seek employment.

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ASSIGNMENT SHEET 3: Specific Resume

Directions: Prepare a resume for a specific application. Target your resume to the specific employer and position.

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1

	Yes	No
Letter:		
1. Was an appropriate reference person selected?		
2. Is the letter mailable?		
3. Is the request courteous?		
4. Is the purpose easy to understand?		
5. Did the writer express appreciation?		
6. Based on this letter, is the impression positive so that the reader can easily grant the request?		
Telephone Call:		
1. Was the caller courteous?		
2. Was the purpose of the call explained clearly and promptly?		
3. Did the caller express appreciation?		
Evaluation for Assignment Sheet 2		
1. Is the resume mailable?		
2. Can the reader easily see the applicant's name and contact information?		
3. Are the components arranged to best focus attention on the applicant's abilities and potential?		
4. Is the format of the resume well balanced so that it is easy to read?		
5. Is the resume complete?		
6. Is the resume appropriate to the field?		
7. Is the resume accurate?		

Evaluation for Assignment Sheet 3

		Yes	No
1.	Is the resume mailable?		
2.	Can the reader easily see the applicant's name and contact information?		
3.	Are the components arranged to best focus attention on the applicant's abilities and potential?		
4.	Is the format of the resume well balanced so that it is easy to read?		
5.	Is the resume complete?		
6.	Is the resume accurate?		
7.	Is the resume appropriate to the employer and position?		

POSTTEST

I. True/False: In each blank, write TRUE if the statement is true and FALSE if it is false.

__________ 1. A resume should include employment information that is relevant to the position being sought, and irrelevant employment information should be omitted.

__________ 2. A resume helps to "sell" the applicant and his/her abilities to an employer.

__________ 3. References are people who can describe your abilities and potential to an employer.

__________ 4. A resume should include references' names, employment affiliation, address and telephone number during business hours.

__________ 5. The resume should include five references.

__________ 6. The length of the resume is not important; the important thing is to provide all information that might be important in the hiring decision.

__________ 7. The applicant should provide answers to questions which are illegal for the employer to ask so that the employer will have the information to consider in making the hiring decision without actually asking an illegal question.

II. Identification: Circle the letters of items which should be included in a resume.

A. name, address, telephone number
B. age, sex
C. job objective, career goal
D. dates of education
E. dates of employment
F. memberships, activities, awards, honors

POSTTEST KEY

I. 1. FALSE
   2. TRUE
   3. TRUE
   4. TRUE
   5. FALSE
   6. FALSE
   7. FALSE

II. A, C, D, E, F

LESSON OBJECTIVES

1. Given a simulated interview activity, the student will complete the employment process according to a performance worksheet with 90 percent accuracy within 45 minutes.

2. Given a description of a position, the student will list and describe, with 90 percent accuracy within 30 minutes, three employment tests which an applicant might be asked to take.

3. Following a simulated interview, the student will compose and prepare a mailable follow-up letter within 50 minutes.

SUGGESTED ACTIVITIES

I. Instructor

   A. Prepare transparencies.

   B. Provide objectives, information sheets, and handouts.

   C. Assign Assignment Sheets.

   D. Ask members of the departmental advisory committee or other business leaders to interview students in practice interviews. Schedule at least one such interview for each student.

   E. Give posttest.

II. Student

   A. Read and discuss objectives, information sheets, and handouts.

   B. Complete Assignment Sheets.

   C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Handouts

   A. HO 1: Potential Interview Questions
   B. HO 2: Interview Evaluation Checklist

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IV. Transparency Masters

A. TM 1: Dress for the Job You Want!
B. TM 2: Remember to Check the Details of Your Appearance
C. TM 3: Expect Surprises!--Handle Offensive Questions With Tact
D. TM 4: Discrimination Is Prohibited by Legislation
E. TM 5: Body Language Conveys a Message!
F. TM 6: What Message Do You Want to Project?
G. TM 7: Sending a Positive Message--Sending a Negative Message
H. TM 8: The Ending: Interviewer--The Ending: Interviewee
I. TM 9: Would I Hire Me?
J. TM 10: The Interview Ends with a Follow-up Letter

V. Assignment Sheets and Answers

A. AS 1: Preparing for the Interview
B. AS 2: Practice Interview
C. AS 3: The Interview
D. AS 4: Follow-Up

VI. Posttest and Key

INFORMATION SHEET

I. Preparing for the Interview

   A. Mental preparation

      1. Get the company's full name and address and learn the interviewer's name and correct pronunciation.

      2. Knowing that you are prepared for the interview is more than half the battle against nervousness.

      3. Purposes of the interview

         a. Interviewer: to learn things about the applicant which are not easy or possible to determine through the letter of application, resume, or application form

         b. Interviewee: to prove to an employer that his/her operation will benefit from hiring the applicant and to determine if the job would best suit the applicant's own skills and needs

      4. Review the qualifications necessary for the job and your ability to meet those qualifications.

      5. Be aware of legislation affecting employment

         a. Title VII of the Civil Rights Act of 1964

            1) Prohibits discrimination because of race, color, religion, sex or national origin

            2) Prevents other unlawful employment practices concerning recriminations against individuals making charges, testifying or assisting in an investigation or hearing

            3) Prohibits sexual harrassment

            4) Creates the Equal Employment Opportunity Commission (EEOC) appointed by the President and serving with the advising consent of the Senate

            5) Describes prevention of unlawful employment practices

            6) Miscellaneous other provisions

b. Equal Pay Act (EPA) of 1963, amended 1972--made unlawful the discrimination in pay on the basis of sex when the jobs require equal skill, effort, and responsibility, and are performed under similar working conditions

c. Age Discrimination in Employment Act (ADEA), 1967; amended 1978

   1) Prohibits job discrimination against workers between 40 and 65 years of age; amended upper limit to 70 years of age and eliminated mandatory retirement for federal workers

   2) Considers unlawful any indication of age preference that would discriminate against the 40-70 age group

   3) Allows using an education requirement such as "high school graduate" if no age is associated with the phrase such as "recent high school graduate"

d. Vocational Rehabilitation Act of 1973

   1) Prohibits discrimination against handicapped persons

   2) The counterpart of Title VII of the Civil Rights Act of 1964

e. EEOC Guidelines

   1) Employers must actively recruit workers in protected classes, such as minorities and females.

   2) Moving organizational facilities must be studied for impact upon minority employment levels.

   3) Media advertisements must conform to legal requirements.

   4) Evidence may be required to document that interviews, application forms, and employment testing are related to job requirements.

   5) Job descriptions, specifications, and performance evaluations must be analyzed concerning their impact on protected groups.

   6) Special efforts must be made to recruit and train minorities and women.

7) Employment benefits must be provided on an unbiased basis.

6. Potential interview questions (HO 1)

a. Legal questions--those that are **bona fide occupational qualifications**

1) Education, training, experience

2) Career interests and work goals

3) Interest in specific job and company--researching the specific position for which you are applying as well as the company demonstrates your initiative and willingness to work to be successful.

4) Salary and benefits--anticipate salary discussion by determining the typical starting salary for the job you want and determining how much you will need for your fixed living expenses. Your salary should provide you with reasonable essentials plus some extras or you won't be content with the job.

5) Self-assessment--in the interview you are selling yourself and your abilities to an employer. Be prepared to make the sale!

b. Illegal questions--Prior to employment of an applicant, any inquiries that, directly or indirectly, would reveal sex, race, religion, age, or national origin, or matters having an unequal effect on various applicant groups, fall in this category. Examples of nonpermissible and permissible inquiries are given below.

INQUIRY AREA	NONPERMISSIBLE	PERMISSIBLE
Identifying Information Name	• Requiring prefix (Mrs., etc.) to applicants name. • Inquiring into previous name of applicant whose name has been changed by court order or otherwise.	• First, middle, and last name of applicant • Other name(s) under which applicant may have worked or attended school, or may be known to reference.
Address	• Inquiring into foreign addresses which would indicate national origin. • Inquiring into length of time at present address. • Inquiring as to whether applicant owns home, rents, rooms, or lives with relatives.	• Applicant's address and telephone number and alternative address and telephone number.

INQUIRY AREA	NONPERMISSIBLE	PERMISSIBLE
Age	• Requesting date of birth or age prior to employment. • Requirement of birth certificate, baptismal record, etc., prior to employment.	• Inquiry of "are you under 18" may be used if desired. • Applicant may be requested to supply work permit from school authorities if question of underage exists. • Applicant may be requested to submit birth certificate or other proof of birth date *after* employment.
Sex	• Inquiry into sex of applicant.	
Marital Status	• Inquiry into marital status of applicant. • Inquiry into applicant's maiden name.	
Religion/Creed	• Inquiry into applicant's religious denomination or affiliation, church, parish, pastor, or religious holidays observed. • Applicant may not be told "This is a Protestant, Catholic, Jewish, etc., organization."	
Race/Color	• Any inquiry indicating race or color.	
Education	• Inquiring about the nationality, racial, or religious affiliation of schools attended by the applicant. • Inquiry about applicant's date of high school graduation.	• Inquiries into academic, professional, vocational, etc., schools attended, courses studied, grades, etc.
Military Service	• Inquiry into applicant's general military experience or other than U.S. military service. • Asking location of local draft board. • Requiring applicant to produce copy of military discharge papers or discharge number. • Requiring applicant to indicate type of discharge.	• Inquiries may be made only for U.S. military service. • Were you dishonorably discharged? • Applicants will be required to submit U.S. military separation papers *after* employment.
Organizations	• General inquiry into organizations to which applicant belongs, or inquiry into organizations which may indicate applicant's race, religion, color, sex, national origin, or ancestry.	• Inquiries may be made about membership in those organizations which are not indicative of race, religion, color, sex, national origin, or ancestry.

INQUIRY AREA	NONPERMISSIBLE	PERMISSIBLE
Photographs	• Any request for applicant's photograph prior to employment.	• Photographs may be requested after hiring if for a legitimate business purpose.
Physical Handicaps; Worker's Compensation	• Discrimination against the physically handicapped is unlawful if the applicant is able and competent to perform the duties of the job. Employing units should be aware that they are under an obligation to take affirmative action to employ and promote qualified handicapped and disabled veteran employees, including an obligation to make reasonable accommodations for such handicapped employees under Department of Labor Regulations issued pursuant to the Rehabilitation Act of 1973 and Vietnam Era Veteran Readjustment Assistance Act of 1974. • Have you ever received worker's compensation?	
Character		
Criminal Record	• Inquiries into arrests.	• Inquiries into convictions (Except for traffic violations).
Character Reference	• Asking references for information about the applicant prohibited by any of the above nonpermissible inquiries.	• Applicant may be asked for references.
Relatives/Dependents		
Dependents	• Spouse's name inquiry. Inquiring about number or ages of applicant's children or other dependents.	• Relevant information about spouse, children, and other dependents may be determined after employment.
Relatives	• Inquiries about names, addresses, ages, etc., of any relative, spouse, or children. • Inquiry into location of relatives' places of business. • Inquiries into relatives currently or previously employed by the company.	
Emergency Notification	• Inquiry about name of relative, spouse, children, or other dependents to notify in case of emergency.	• Inquiring about name and location of *person* to notify.

INQUIRY AREA	NONPERMISSIBLE	PERMISSIBLE
Physical Characteristics		
Height/Weight	• Establishing minimum height or weight hiring requirements, and inquiries about height or weight.	• Inquiries into height and weight are permissible only if a legitimate job need for this information can be established.
Color	• Inquiries into color of hair, eyes, complexion, or color of skin.	
Background Information		
Birthplace	• Inquiry Re: birthplace of applicant, applicant's spouse, parents, other relatives, children, or other dependents. • Requirement that applicant submit birth certificate, naturalization, or baptismal record prior to employment.	• Proof of birth or citizenship may be requested after employment.
National Origin	• Inquiring into applicant's lineage, ancestry, national origin, descent, parentage, or nationality. • Inquiry about nationality of applicant's spouse or parents.	
	• Inquiry about applicant's "mother tongue" or how applicant acquired ability to read, write, or speak a foreign language.	• Inquiry as to languages which applicant can read, speak, or write.
Citizenship	• Any inquiry into citizenship status which would reveal the applicant's lineage, ancestry, national origin, descent, parentage, or nationality. • Inquiry "Of what country are you a citizen?"	• Inquiries of "are you a U.S. citizen?" and "If not a U.S. citizen, do you have the legal right to work/remain permanently in the U.S.?"
	• Asking whether applicant is a naturalized or native-born citizen, or the date when the applicant acquired citizenship. • Asking applicant's date of arrival in U.S. or port of entry. • Asking if applicant's spouse or parents are naturalized or native-born U.S. citizens, or asking the date when such persons acquired citizenship. • Requiring applicant to produce naturalization or first papers.	• Proof of citizenship or birth or of legal right to work or remain in the U.S. may be requested after employment.

Source: Zima, Joseph P. Interviewing: Key to Effective Management. Chicago: Science Research Associates, 1983, pp. 136-139.

7. Anticipating problems

   a. Prejudice

      1) Applicants for employment may encounter many kinds of interviewer prejudice. As a result of widespread prejudice, legislation making unlawful discrimination based on race, color, religion, sex, national origin, or age was enacted.

      2) Some interviewers, however, have not conformed to the legislation. Typically, the larger the organization, the more likely the employment procedures will meet the requirements of legislation.

      3) Despite the framework provided by legislation, applicants may still encounter prejudice against teenagers/young people, applicants seeking their first employment, or applicants seeking their first employment in their selected career fields.

      4) The best response to prejudice is preparation. An applicant who can "sell" his/her skills, abilities, education, and potential will not need to concentrate on his/her age or lack of experience.

   b. Prior involuntary termination from employment--employees may be terminated from employment involuntarily for a number of reasons. Being "fired" even when justified by employee action would continue to be a problem only if the former employee fails to learn from his/her mistakes or if she/he criticizes the actions of the former employer.

      1) Anticipate questions that may probe skeletons in your closet and prepare honest answers that will reflect positively on you.

      2) Accept responsibility for personality conflicts.

      3) Avoid talking about a former employer.

      4) If you must discuss a bad situation about a former employer, do so without criticism or bitterness.

B. Appearance

1. Dress--(For more information, refer to Unit XII - PERSONAL DEVELOPMENT: Lesson 2 - Business Dress.)

    a. Dress as if you were applying for a job one or two steps higher than the one for which you are interviewing to show that you will fit the future of the company. (TM 1)

    b. Dress conservatively but according to the image of the company and the demands of the job.

    c. Wear something that enhances your self-confidence.

    d. Women, clean out your handbag! This is not the time to be prepared with everything you might need--instead, carry only those things you will need in the interview. You can leave everything else in your car or at home for the short time of your interview appointment.

2. Grooming

    a. Grooming provides the "finish" or details that complete a person's appearance. Give special attention to those details. (TM 2)

3. Health

    a. Appearance often forms the basis of others' opinions concerning not only their economic status and potential but also their health and potential health problems. For example, a person who is overweight is assumed to have more potential health problems than a slender person. A person with pallid color is assumed to have more problems than a person with "healthy" color.

    b. The look of health consists of: weight maintained within the normal range for persons of comparable height, glowing skin, lively eyes, sparkling teeth and fresh breath, and a confident, enthusiastic outlook.

C. Materials to bring to the interview

1. Resume

2. Personal information inventory

3. Smooth writing pen with black (preferred) or blue ink

    4. Pencil
    5. Comb, tissues, etc., to freshen your appearance

  D. Timing

    1. Get sufficient sleep the night before your interview so that you appear rested and alert.
    2. Plan to arrive at the interview location 10 to 15 minutes early.
      a. This allows for unexpected happenings enroute.
      b. You will then have time to organize your thoughts before talking with the interviewer.
      c. This will give you an opportunity to acclimate to the company's atmosphere. Do the employees appear comfortable and confident or pressured and hostile? Are the surroundings pleasant and spacious or cramped and uncomfortable?

II. The Interview

  A. Verbal Communication

    1. The receptionist
      a. Greet the receptionist with a smile.
      b. Give your name and the reason for your arrival.
    2. The interviewer
      a. Greet the interviewer by name and with a smile.
      b. Be prepared to shake hands if the interviewer offers his/her hand.
      c. Sit when and where the interviewer indicates.
      d. Even if the interviewer invites you to smoke, avoid doing so during the interview. You should be able to concentrate for 20 to 30 minutes without a cigarette.
      e. Answering questions--put yourself in the interviewer's place. In 15 to 45 minutes she/he will try to understand your attitudes, motivations, and behavior which you have been developing throughout your life. (HO 1)
        1) Listen to the question.

2) If the question is unclear:

    (a) Interpret it in your own way, structuring your answer to be most favorable for you.

    (b) Ask for a clarification.

3) If you think the question is too broad or general, refocus it in your answer.

4) Use thinking time wisely; ask for a clarification or use a bridge. A response without thinking may not contain the information that you really want to share with the interviewer.

5) Be natural. Talk with your interviewer and respond with natural eye contact.

6) Assume that every question is asked for a purpose.

    (a) If you can quickly identify the purpose of each question, you will be more likely to provide the most relevant information in your answer.

    (b) Recognize dual-purpose questions and answer them decisively.

7) Expect surprises!

8) Handle offensive questions firmly but tactfully. Tactfully decline to answer questions about your private life. (TM 3)

9) Answer specific questions explicitly.

10) Pre-employment inquiries may not be made for the purpose of discriminating on the basis of race, color, religion, sex, national origin, or age (unless the position is covered by federal or state employment restrictions on worker age, such as a hazardous occupation). (TM 4)

b. Asking questions

1) An applicant who has researched the company is better prepared with specific questions and comments that indicate his/her abilities.

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2) Encourage the interviewer to talk about the firm, perhaps by asking questions about its products and services to allow you to learn about the company.

3) Potential questions include:

   a) What would be my initial duties and responsibilities?

   b) How well will this job use my particular background and abilities?

   c) Where does this company/organization rank in its industry?

   d) What kinds of training programs does the company provide?

   e) Where will this company be five years from now at its present rate of growth?

   f) What advancement opportunities are there for a person with my background and work experience?

   g) Who are your major competitors?

   h) Are promotions generally based on seniority or merit?

   i) What are the company's major benefits to employees? In my job level?

B. Nonverbal communication

1. Remember, the most important thing the interviewer, and sometimes even the receptionist or other people you meet in the interview process, gets from the interview is an intuitive feeling about you. It may be because of something you say or it may be because of the way you act or handle silence--nonverbal communication.

2. Facts are best communicated verbally; feelings, nonverbally. Hesitations, silences, the choice of words, voice, and posture may be more revealing than the actual words used. (TM 5)

3. Nonverbal communication may be most important when the spoken words and "body language" do not agree.

   a. The receptionist

        1) Wait patiently until you greet the interviewer.

        2) If given an application form to complete, being prepared with writing instruments as well as the necessary information indicates competence and advance thought.

    b. The interviewer--just as you are communicating nonverbally, the interviewer will be doing the same. Each interviewer you encounter will probably communicate differently but each will give clues about how you are being received. You should be perceptive enough to recognize these clues and adjust your interview accordingly.

4. Smile and enter the interviewer's office with confidence. (TM 6)

5. Positive nonverbal communicators (TM 7)

    a. Appearance and expressions

        1) Sincere smile

        2) Appropriate dress and grooming

        3) Good eye contact

    b. Body posture

        1) Orientation to encourage interpersonal interaction

        2) Leaning slightly toward the interviewer

        3) Facing the interviewer squarely

        4) Relaxed, active involvement in conversation

        5) Sitting with arms and legs uncrossed, communicating openness

    c. Vocal behavior

        1) Warm, interesting, natural voice

        2) Appropriate volume and pitch

        3) Good speaking rate

        4) Fluent use of language

        5) Appropriate enthusiasm

        6) Confidence in handling silence

d. Gestures and mannerisms

1) An outstretched hand

2) Firm handshake

3) Nodding in agreement

6. Negative nonverbal communicators (TM 7)

a. Appearance and expressions

1) Air of superiority or bragging

2) Inappropriate dress

3) Poor eye contact--downcast, peering, staring, constantly moving

b. Body posture

1) Rigid

2) Sitting on edge of chair as if ready to bolt

3) Sitting with arms and legs crossed

c. Vocal behaviors

1) Cold, impersonal

2) Inappropriate volume

3) Unclear enunciation

4) Inappropriate speaking rate

5) Stammering

6) Lack of confidence in handling silence

7) Too many instances of "uhhhhhhhh," "you know," and other such phrases

d. Gestures and mannerisms

1) Cold, unsteady greeting

2) "Limp noodle" or crushing handshake

3) Constant awareness of time by looking often at watch or clock

4) Nervous habits

        5) Interest in the materials on the interviewer's desk

        6) Frequent shifts in body position

        7) Yawns, nervous twitches, shallow breathing, excessive perspiration

7. The environment

    a. Evaluate the environment. Do you want to be part of it?

    b. Employees who trade their values and priorities for a paycheck are seldom satisfied for a long period of time.

8. Ending the interview (TM 8)

    a. Should the applicant have no further questions, make certain that an understanding has been reached as to how the notification of employment will occur before leaving the interview.

    b. With all questions answered, the applicant should rise, thank the interviewer for the interview, again shake hands if the interviewer offers him/her hand, and leave the office.

    c. When exiting by the receptionist, also thank him/her and, if it is natural and comfortable, make some other pleasant comment.

C. Employment Testing

1. Aptitude tests are intended to predict future performance of individuals and may be used to screen applicants during the selection process.

   Examples are the SET (Short Employment Test), BMCT (Bennett Mechanical Comprehension Test), EAS (Employment Aptitude Survey), GATB (General Aptitude Test Battery), and Wonderlic Personnel Test.

2. Achievement tests are used to measure general skills and knowledge or job-specific skills and knowledge.

   General examples include: ABLE (Adult Basic Learning Examination), Metropolitan Achievement Test, Stanford Achievement Test, Typing Test for Business, Shorthand Test, and USES Clerical Skills Test.

Job-specific examples include a data entry timing, a production timing, dictation for transcription using either shorthand or machines, or a grammar/spelling/punctuation test.

3. Interest tests are primarily counseling tools to aid individuals in relating their interests to occupations.

   Examples include the Strong Vocational Interest Blank, Kuder Preference Record, and USES Interest Check List.

4. Personality measures are also counseling tools and have little use in the employment setting. A substantial number of very different individuals may perform many jobs equally well, negating the value of personality measures in the employment process.

5. Medical examinations are used by some employers to determine if applicants have medical problems which could be detrimental to their job performance.

III. After the Interview

A. Self-analysis--following the interview, evaluate your performance. (TM 9) (HO 2)

1. Did you have all the necessary facts about the interview?

2. Were you prepared for the questions asked?

3. Which questions surprised you? How could you answer each of them better next time?

4. Did you encounter prejudice? Did you handle it positively? How could you have done better?

5. Was your appearance appropriate to the position? To the company? Did it strengthen your self-confidence?

6. Did you take everything you needed for the application form and interview?

7. Did you arrive at the appropriate time?

8. Were you confident in greeting the receptionist and waiting for the interview?

9. Were you confident in greeting the interviewer? If you shook hands, was your handshake firm and confident?

10. Were you prepared with questions to ask the interviewer?

11. Could you "read" the interviewer's body language?

12. Did you use positive body language?

13. Were you prepared for the employment tests which you took?

14. What can you do to be better prepared in your next interview?

B. Common interview errors--applicants who commit one or more of these errors provide incentive for an employer to hire another applicant.

1. Arrive late
2. Fail to contact the employer if a late arrival is unavoidable
3. Take a friend or relative
4. Chew gum
5. Dress inappropriately
6. Fail to display enthusiasm
7. Display surliness
8. Display a generally negative attitude
9. Display a lack of knowledge about the company, its products or services
10. Appear to have no goals or sense of direction
11. Answer questions evasively
12. Offer a weak handshake
13. Smoke
14. Fail to look the interviewer squarely in the eye
15. Assume a cocky attitude
16. Show an overly negative attitude toward a former employer
17. Submit an incomplete and/or messy application
18. Submit an incomplete and/or messy resume
19. Submit a resume that is too long
20. Appear overly concerned with benefits

C. Follow-up letter--after the interview, write a thank you note--not necessarily elaborate but obviously sincere--expressing your appreciation for the interview. This will remind the interviewer of you and reiterate your interest about the job. (TM 10)

POTENTIAL INTERVIEW QUESTIONS

EDUCATION, TRAINING, EXPERIENCE

1. What subjects did you enjoy the most? Why?
2. What subjects did you enjoy the least? Why?
3. In which subjects did you get your best grades?
4. In which subjects did you do poorly? Why?
5. What special certificates or awards have you received?
6. How well do you think you have been prepared for the world of work? Why?
7. What courses do you think are directly transferable to the job?
8. What kinds of training have you received?
9. What kinds of skills were acquired as a result of that training?
10. Will you need additional training to do the job here?
11. What do you know about (specific theories, ideas, concepts)?
12. Tell me about your work history.
13. What are your special job strengths?
14. What did you like most about your last job?
15. What did you like least about your last job?
16. How did your previous work experiences prepare you for this position?
17. What was your major accomplishment on your last job?
18. Explain your job duties in your present (or past) job?
19. What did you do on your last job?
20. What did you find most frustrating on your last job?
21. What did you like about your boss? What did you dislike?
22. Why did you leave your last employer?
23. How well did you perform on your last job?

24. What kinds of evaluations did you receive on your last job?

25. How did you obtain the job(s) you have held and why did you leave?

26. How did previous employers treat you?

27. What have you learned from some of the jobs you have held?

28. Can you get recommendations from previous employers?

CAREER INTERESTS AND WORK GOALS

1. What are your short- and long-term objectives or goals?
2. What would it take to be successful in such a job?
3. What kinds of things would you want to avoid in future jobs?
4. What other types of jobs have you considered?
5. What kinds of developmental experiences might be necessary to reach your goals?

INTEREST IN SPECIFIC JOB AND COMPANY

1. Why does this job appeal to you?
2. How do you feel about working overtime, alternating shifts, and weekends?
3. What do you know about this job?
4. What do you know about our company? Organization? Products? Services? Locations?
5. Why do you want to work for us?
6. What interests you about our product or service?
7. Are you looking for a permanent or temporary job?
8. What job in our company would you choose if you were free to do so?

SALARY AND BENEFITS

1. What are your salary goals?
2. What starting salary do you expect?

3. What fringe benefits are most important to you?

4. How much are you worth to our company? Why?

5. What kind of salary do you expect to be earning in five years?

6. What was the salary on your last job?

7. How much money do you hope to earn at age 30? 35?

SELF-ASSESSMENT

1. What are some of the basic factors that motivate you in your work?

2. Describe a difficult obstacle that you overcame in your last job. How did you handle it? What did you learn from the experience?

3. What kinds of things frustrate you most on a job? How do you cope with them?

4. What would you consider to be your greatest achievements to date? Why?

5. How would you assess your ability to handle details? Evidence?

6. How successful are you at persuading others? Evidence?

7. What is your attendance record?

8. How well do you work under the pressure of deadlines?

9. What evidence can you provide that you can work effectively under pressure?

10. How well did you get along with your boss?

11. How well did you get along with your co-workers?

12. Do you prefer working alone or with groups?

13. How much are you worth?

14. Why should we hire you?

15. What have you not told us about yourself?

16. What are your future vocational plans?

17. In what school activities have you participated? Why? Which did you enjoy most?

18. How did you spend your spare time?

19. In what type of position are you most interested?

20. What qualifications do you have that make you feel you will be successful in your field?

21. Can you change learned responses easily?

22. Do you think that your extracurricular activities were worth the time you devoted to them? Why?

23. What do you think determines a person's progress in a good company?

24. What personal characteristics are necessary for success in your chosen field?

25. Can you take instructions without feeling upset?

26. Do you feel you have done the best scholastic work of which you are capable?

27. How long do you expect to work?

28. Do you like routine work? Regular hours?

29. What is your major weakness?

30. Define cooperation.

31. Are you ambitious?

32. Do you demand attention?

33. Do you have an analytical mind?

34. Are you eager to please?

35. Is it an effort for you to be tolerant of persons with backgrounds and interests different from your own?

36. What types of books have you read?

37. What types of people seem to rub you the wrong way?

38. What are your special abilities?

39. What is your idea of how industry operates today?

40. Do you think grades should be considered by employers? Why or why not?

41. What have you done that shows initiative and willingness to work?

HO 2

Handout 2: INTERVIEW EVALUATION CHECKLIST

Applicant's Name: ______________________________ Position: ______________________________

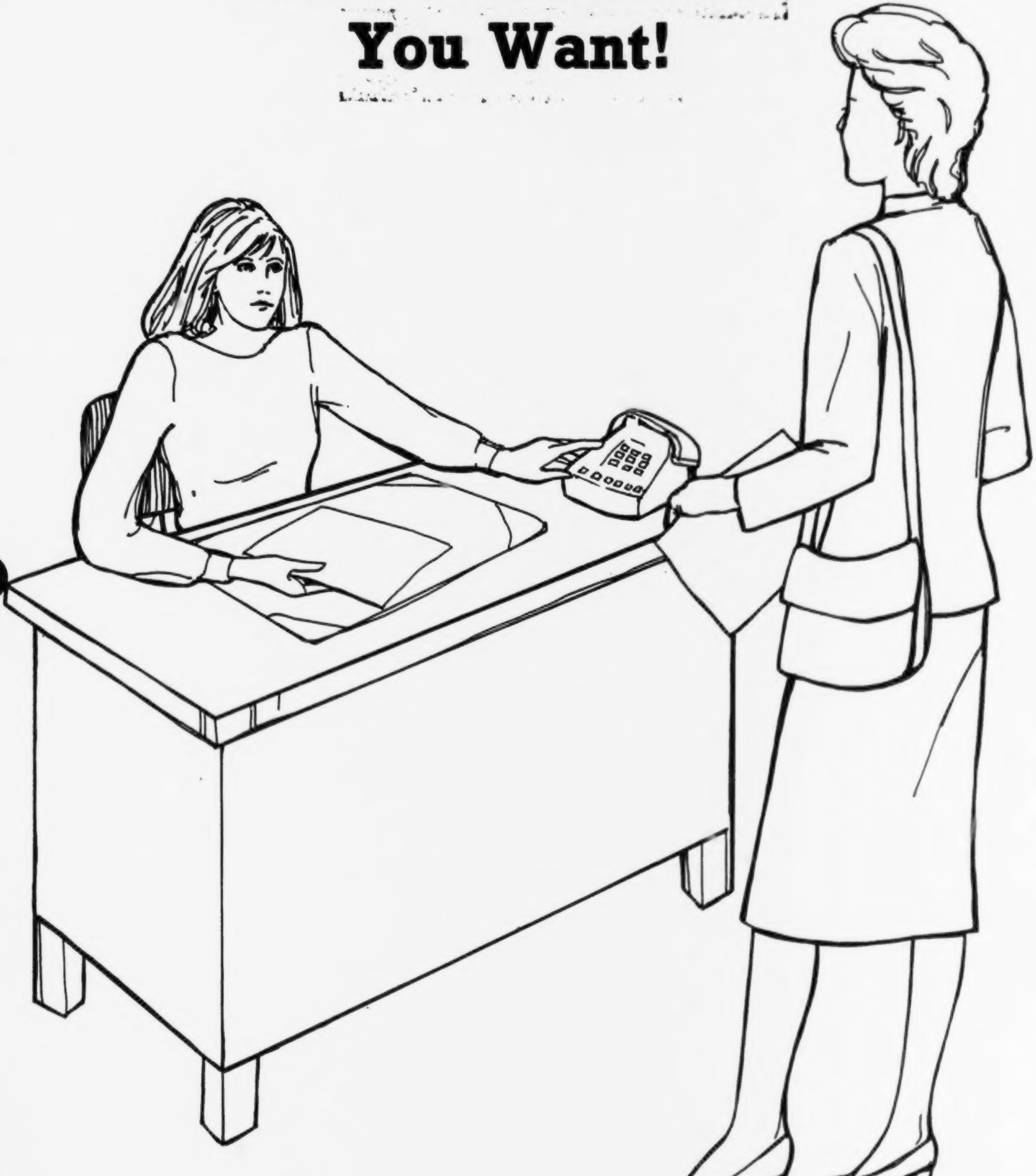
Interview Time: ____________________ Interview Date: ______________________

	IMPRESSIVE	ACCEPTABLE	NEEDS IMPROVEMENT	NOT OBSERVABLE
Written Materials: letter of application				
resume				
application form				
Appearance: clothing–clean, well-pressed, appropriate				
grooming–clean, odor-free; hair clean, appropriately styled and combed				
accessories–appropriate, clean, shoes polished				
Reception Area: promptness				
greeting				
confidence				
preparation for completing application form				
patience in waiting				
Interview: promptness				
greeting–smile, correct pronunciation				
handshake				
seating when/where indicated				
eye contact				
listening skills				
answers to questions–thorough, brief, reflected thought				
confidence				
applicant's knowledge of company				
applicant's potential contributions to company				
courtesy, tact				
enthusiasm				
honesty				
Conclusion: courtesy in expressing appreciation				
prompt departure				
handshake				
pleasant exit from reception area				

WOULD YOU HIRE THIS APPLICANT?

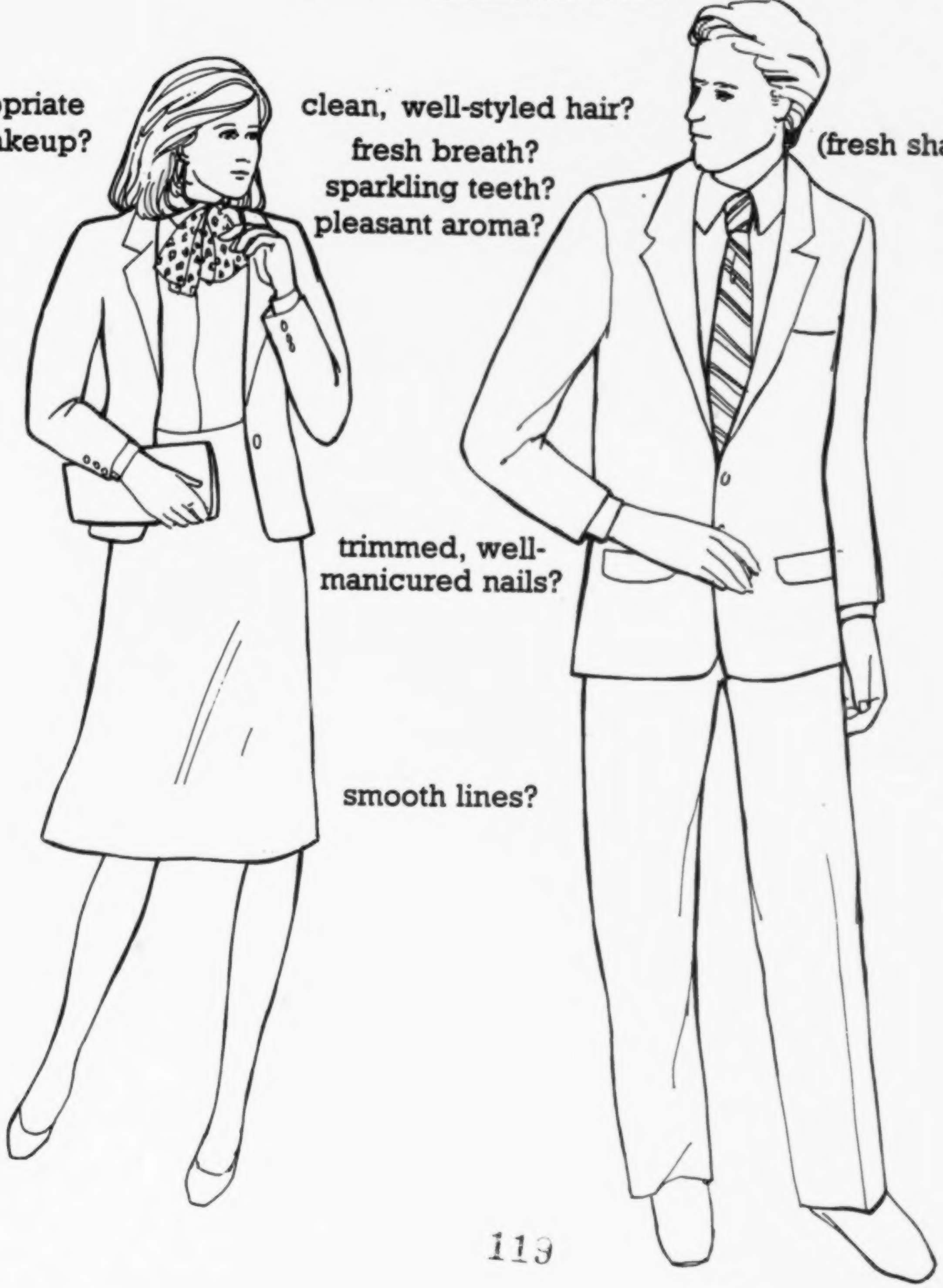
YES _____ NO______

Dress for the Job You Want!



TM 2

Remember to Check the Details of Your Appearance



appropriate makeup?

clean, well-styled hair?

fresh breath?

sparkling teeth?

pleasant aroma?

(fresh shave?)

trimmed, well-manicured nails?

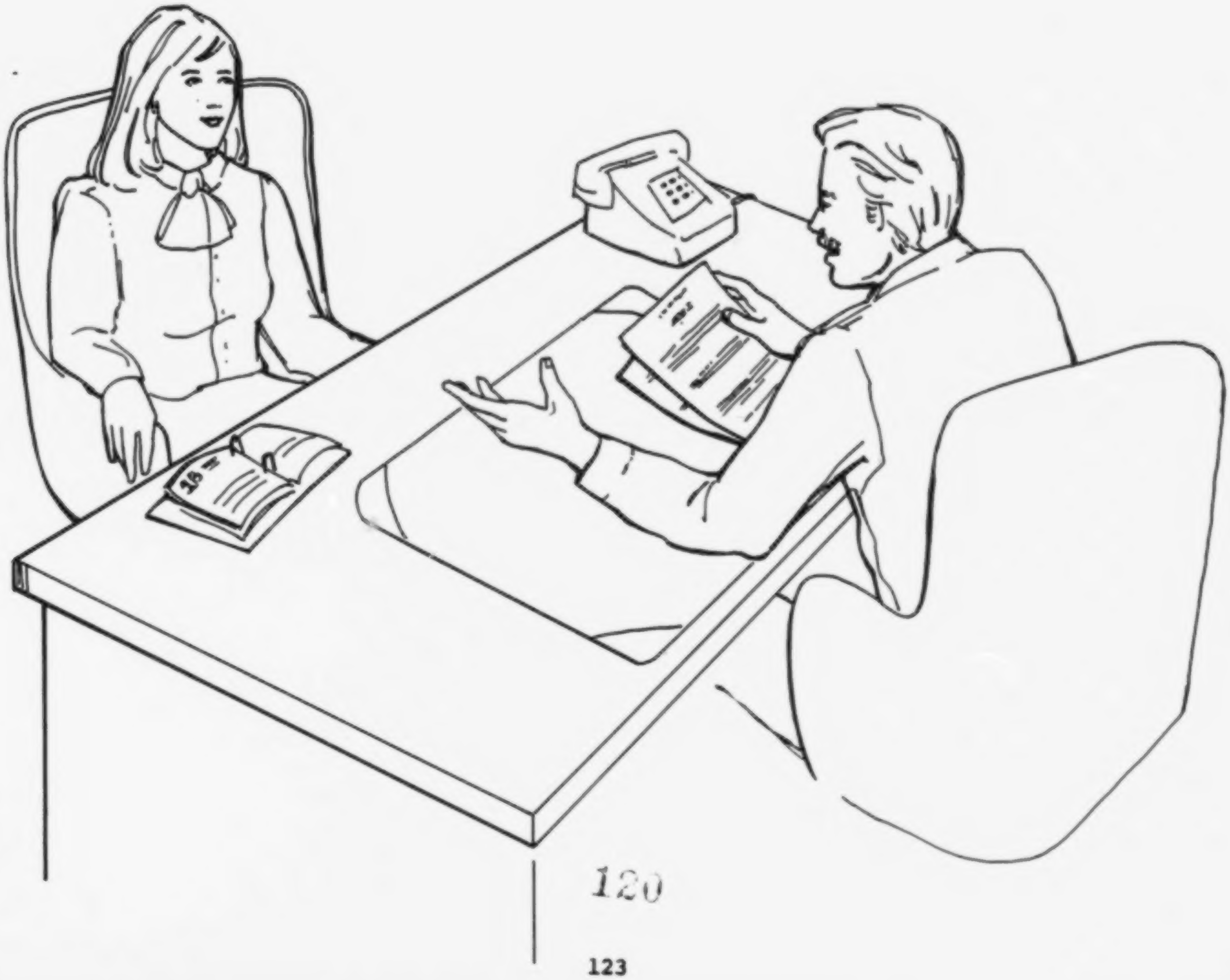
smooth lines?

Expect Surprises!

"Why should I hire you rather than any of the other 15 applicants?"

Handle Offensive Questions With Tact

"How soon do you plan to have children?"



TM 4

race

age

Discrimination

Is Prohibited

by Legislation

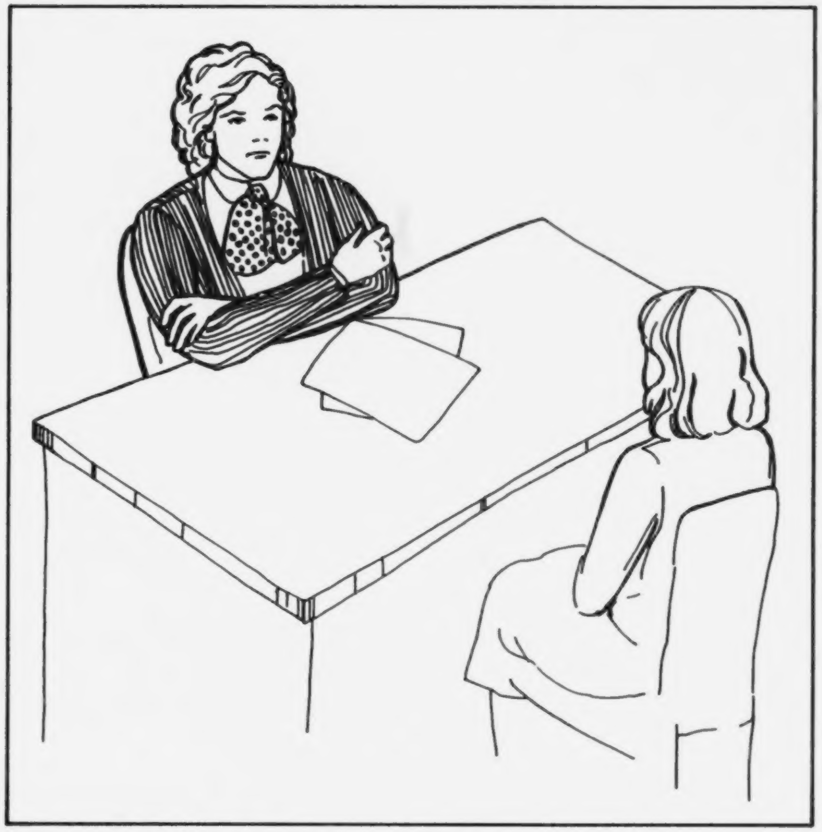
national origin

marital status

color

religion

Body Language Conveys a Message!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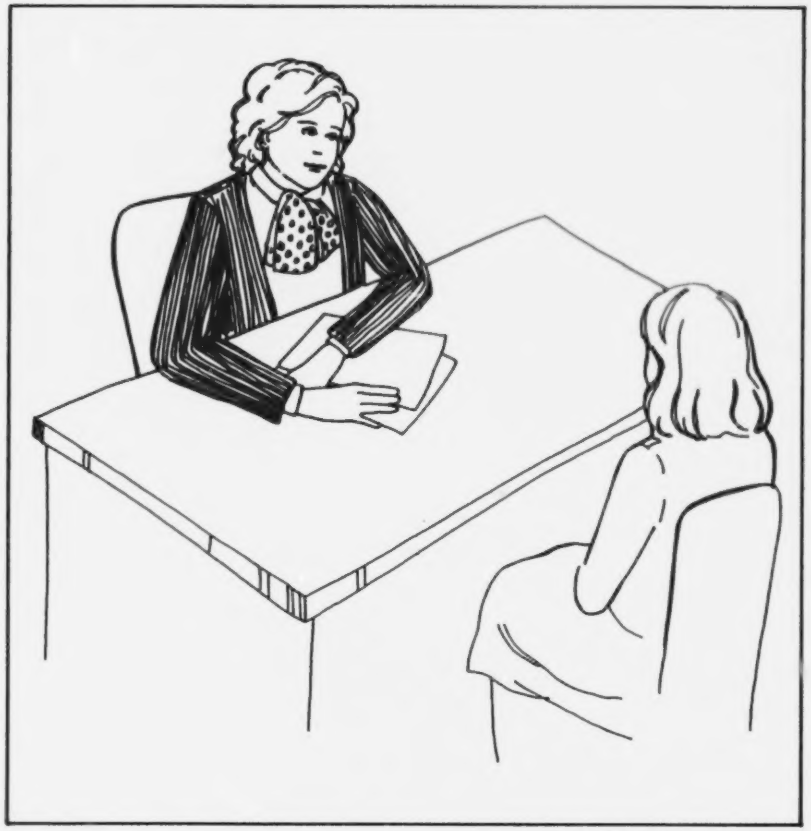
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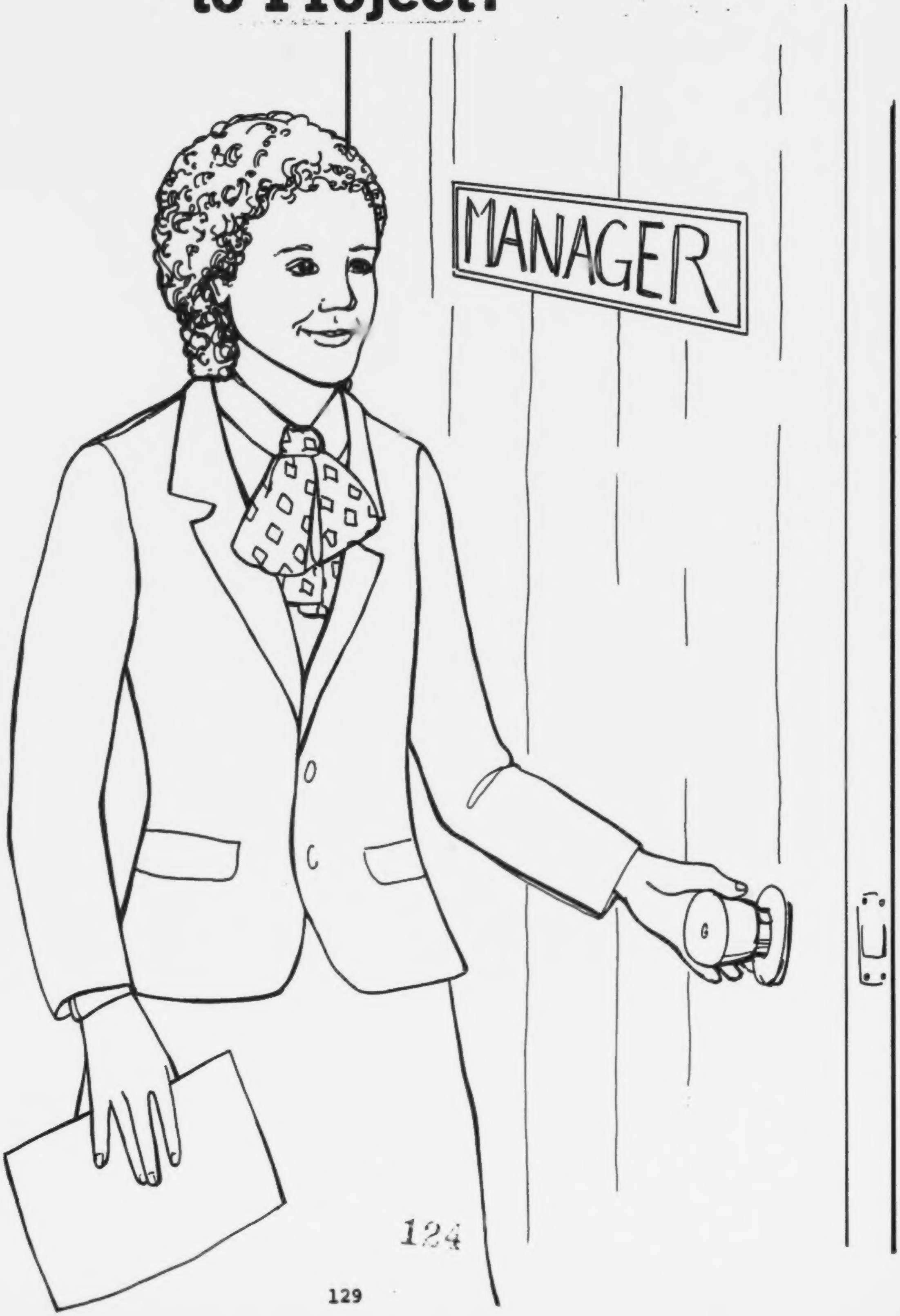
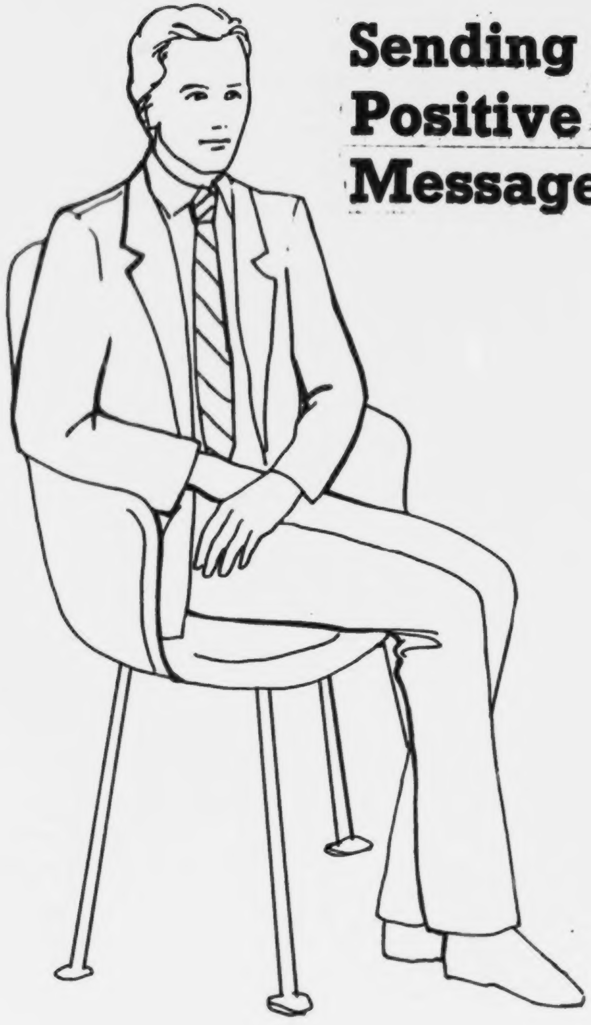
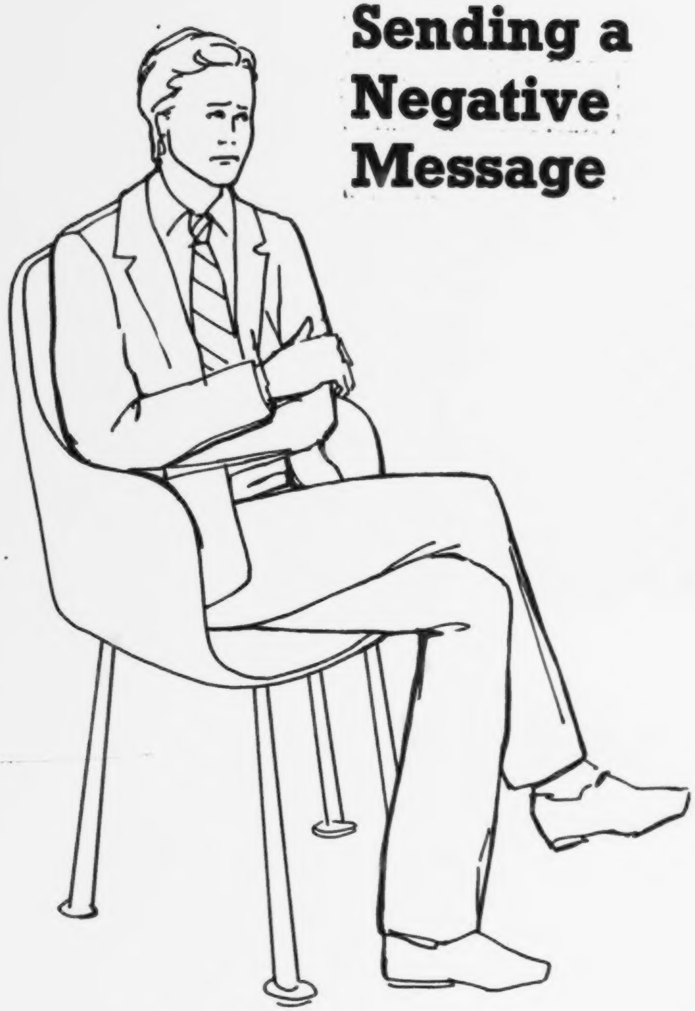
TM 5

What Message Do You Want to Project?





Sending a Positive Message



Sending a Negative Message

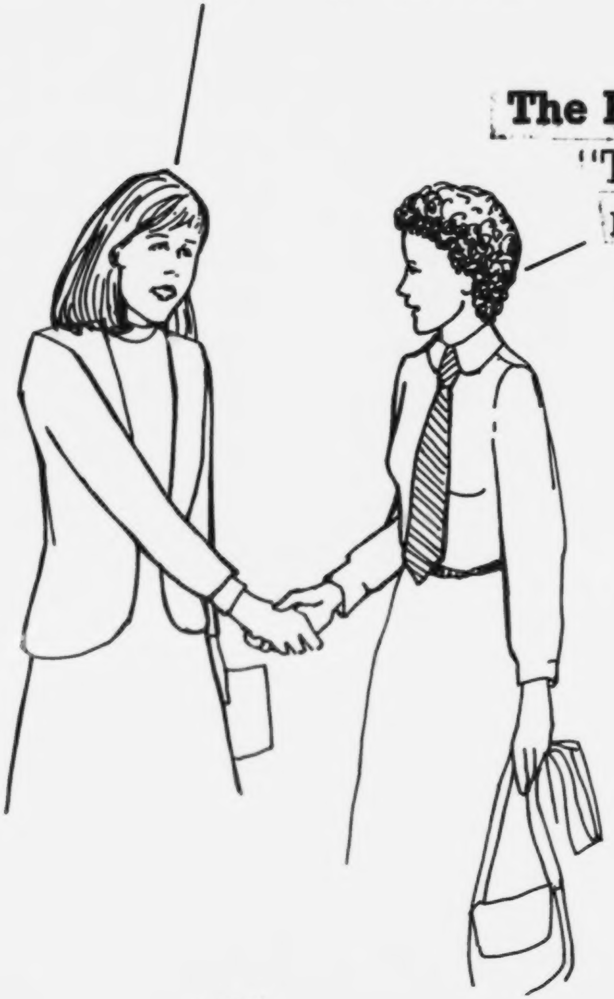
TM 7

The Ending: Interviewer

"Thank you for coming to talk with me today."

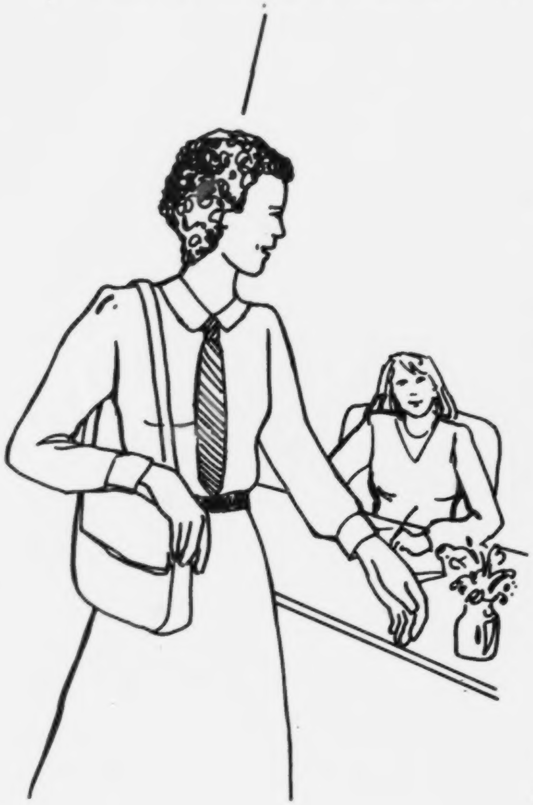
The Ending: Interviewee

"Thank you for seeing me today. I hope to hear your decision next week."



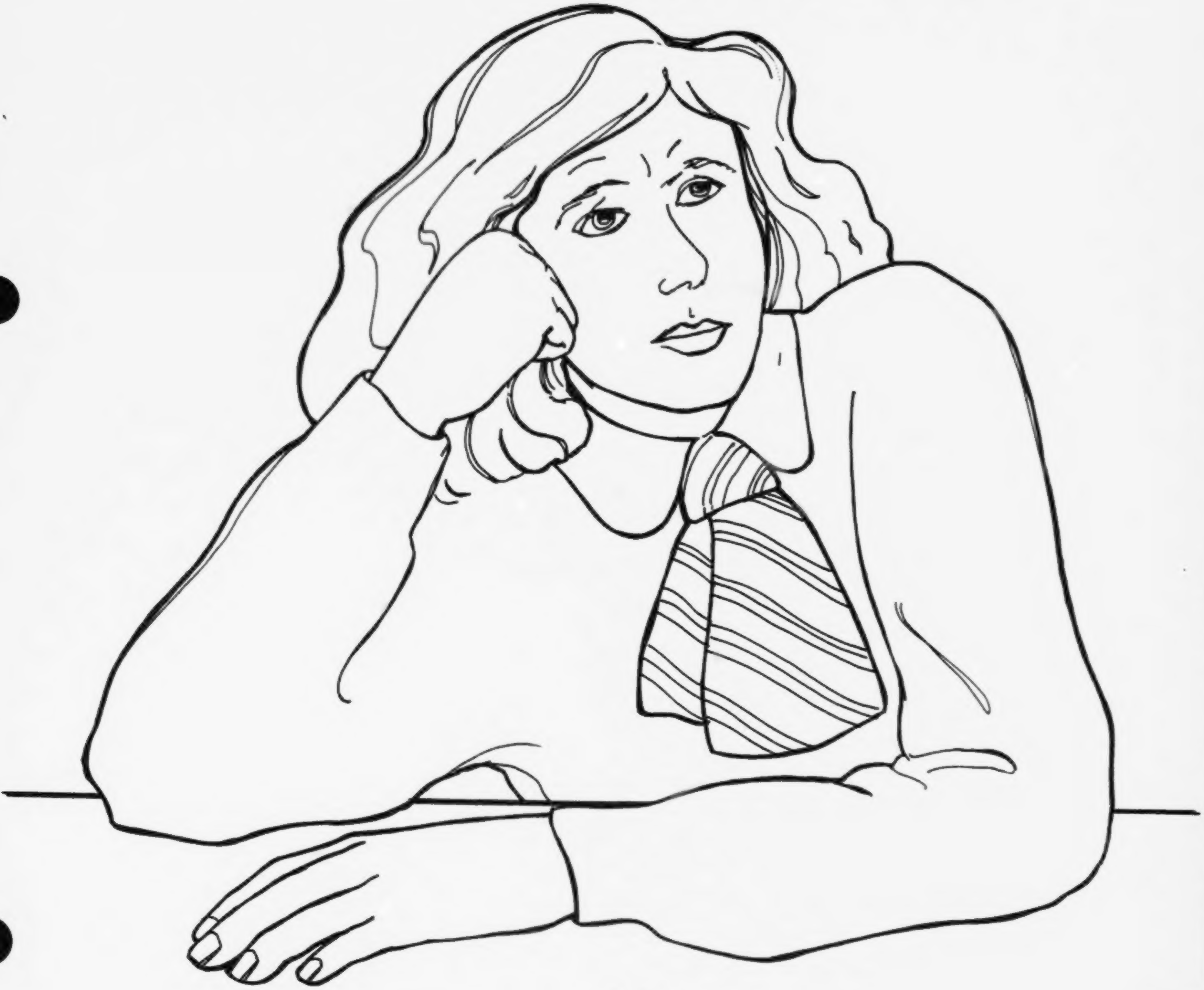
The Good Exit

"Have a good day!"



TM 9

Would I Hire Me?



"Based on that interview,
would I hire me?"

TM 10

The Interview Ends With a Follow-up Letter

Current Date

Ms. Jacqueline Brandenberg
Director of Personnel
Fainstein and Associates
3701 Broadway
Columbia, MO 65201

Dear Ms. Brandenberg:

Thank you for giving me the opportunity to interview with Fainstein and Associates. I am very interested in the word processing secretarial position which we discussed yesterday.

I appreciate the time you spent with me and look forward to hearing your decision.

Sincerely,

ASSIGNMENT SHEET 1: Preparing for the Interview

Directions: Prepare yourself for an interview for a position which you select. Preparations include mental preparations, your appearance, and assembling the material which you would take to the interview.

ASSIGNMENT SHEET 2: Practice Interview

Directions: The class will be divided into groups to role-play various interview situations. Specific roles and details will be assigned by your teacher.

FOR THIS ASSIGNMENT YOUR SCHEDULE IS:

Interviewee

Date: ____________________ Time: ____________________

Location: ____

Receptionist

Date: ____________________ Time: ____________________

Location: ____

Interviewer

Date: ____________________ Time: ____________________

Location: ____

As the interviewee, prepare for the interview as you did in Assignment Sheet 1.

As the receptionist, you will greet an applicant, give him/her an application form to complete, and evaluate this applicant's performance according to the guidelines contained in this lesson.

As the interviewer, you will interview an applicant for the position she/he has selected. Evaluate this applicant's performance in the interview as if you were actually considering him/her for employment. You may use the questions in the handout in this lesson for this interview.

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ASSIGNMENT SHEET 3: The Interview

Directions: An interview with an area business person will be scheduled for each student. Complete your assigned interview and have the interviewer complete the Interview Evaluation Checklist (HO 2) to be returned to your instructor.

Your interview will be:

Date: ____________________ Day: ____________________

Location: ____

Remember, your appearance and preparation will be evaluated as well as the way you talk with the receptionist and interviewer.

ASSIGNMENT SHEET 4: Follow-Up

Directions: Follow-up your interview in Assignment 3 with an appropriate thank-you letter.

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1

	Yes	No
Evaluate each student's appearance according to the guidelines for dress contained in this lesson and in Unit XII - Personal Development: Lesson 2 - Business Dress. 1. Is the appearance appropriate for the position selected?		
2. Is the appearance appropriate for the employer's image?		
3. If the student is female, did she include those items in her handbag which she should have at the interview?		
4. Did the student appear self-confident and poised?		
Evaluation for Assignment Sheet 2 1. Ask the interviewers to evaluate the interviewees as if they were actually considering the applicants for employment in the positions selected.		
2. Ask the receptionist to evaluate the interviewees as if they were seeing them as potential fellow employees.		
3. Ask the interviewees to evaluate the interviewers for their questions in relation to the positions being sought.		
4. Use Interview Evaluation Checklist (HO 2) to evaluate each applicant's performance.		

Evaluation for Assignment Sheet 3

1. Invite representatives of local businesses and industry, as well as members of the departmental advisory committee, to serve as interviewers.

2. Schedule an interview for each student. Ask the interviewer to evaluate the student as if she/he were actually considering that student for employment in the position selected by the student using the Interview Evaluation Checklist (HO 2).

Evaluation for Assignment Sheet 4	Yes	No
1. Is the letter mailable?		
2. Is the letter enthusiastic and courteous?		
3. Does the letter create a pleasant, positive impression?		

POSTTEST

I. True/False: In each blank, write TRUE if the statement is true or FALSE if it is false.

_________ 1. If a company hires an equal number of males and females for the same type of work, the pay must be equal.

_________ 2. If the company hires more of one sex than the other, members of that sex may receive higher wages for doing the same job as members of the minority sex.

_________ 3. Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act, and the Vocational Rehabilitation Act prohibit discrimination because of sex, race, age, handicap, or other nonemployment-related factors.

_________ 4. Legal interview questions are those which relate to bona fide occupational qualifications.

_________ 5. An interviewee should arrive 10 to 15 minutes prior to the time of the interview appointment.

_________ 6. First impressions are based upon appearance--dress, grooming, apparent health.

_________ 7. If the interviewer does not initiate a handshake with the interviewee, the interviewee must take the initiative.

_________ 8. An interviewee should be prepared for surprises during the interview.

_________ 9. Interviews provide time for the interviewer to question interviewees, but interviewees must not ask questions.

_________ 10. The interview gives the interviewee an opportunity to determine if she/he wants to consider employment at the company should a job position be offered.

_________ 11. Employment testing may include aptitude, achievement, interest, personality, or medical tests.

__________ 12. Following the interview, the applicant should evaluate his/her performance and express appreciation to the interviewer.

II. Multiple Choice: Circle the letter of the best answer.

1. Nonverbal communication can

   a. reinforce verbal communication
   b. contradict verbal communication
   c. communicate attitudes
   d. all of the above
   e. none of the above

2. Which of the following is a permissible interview inquiry?

   a. Are you under 18 years old?
   b. Do you own your home?
   c. Are you married?
   d. Is your family name of French origin?
   e. Have you ever been arrested for a felony?

3. Which of the following is a nonpermissible interview inquiry?

   a. Could you give me three personal character references?
   b. Whom should we notify in case of emergency?
   c. Do you belong to the local Jaycees?
   d. Did you have any grades lower than a C?
   e. Doesn't your wife/husband work for the Acme Company?

4. Which of the following dress guidelines should an applicant observe?

   a. dress conservatively
   b. dress according to the demands of the job
   c. dress as if you were applying for a job one or two steps higher than the one for which you are actually applying
   d. all of the above

5. To project good body language, you should

   a. cross your legs to show you are relaxed
   b. speak very softly so the interviewer will listen closely to what you are saying
   c. face the interviewer squarely and lean slightly toward him/her
   d. be sure to quickly fill any period of silence

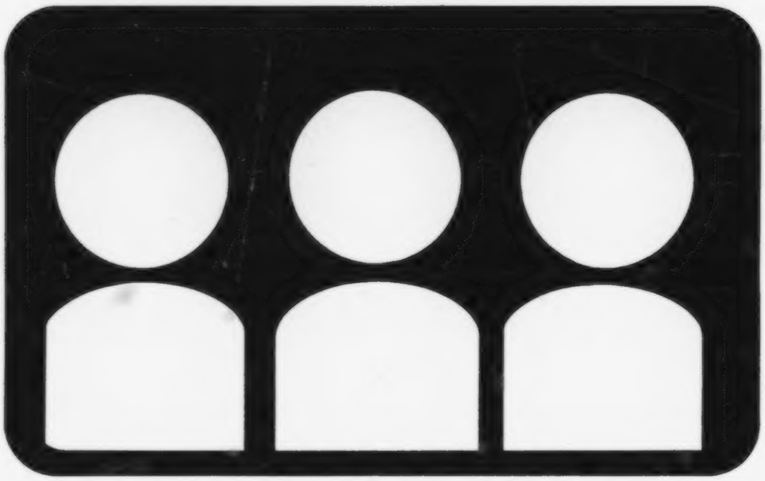
6. Which of the following employment tests are designed to measure your general skills and knowledge or job-specific skills and knowledge?

   a. Stanford Achievement Test, ABLE, Metropolitan Achievement Test
   b. Kuder Preference Record, Strong Vocational Interest Blank
   c. SET, BMCT, Wonderlic Personnel Test
   d. medical examinations

POSTTEST KEY

I. 1. TRUE
   2. FALSE
   3. TRUE
   4. TRUE
   5. TRUE
   6. TRUE
   7. FALSE
   8. TRUE
   9. FALSE
   10. TRUE
   11. TRUE
   12. TRUE

II. 1. d
   2. a
   3. e
   4. d
   5. c



Performing Client-Related Services

UNIT XI: Performing Client-Related Services

Unit XI - Client-Related Services

UNIT OBJECTIVES

This unit is intended to provide an introduction to offices that provide client-related services. Following completion of this unit, the student will have demonstrated the following abilities related to tasks in service offices: handling receptionist and telephone responsibilities, typing of forms, typing of correspondence and documents, composing correspondence for client-related situations, and demonstrating a knowledge of service offices.

Lesson Objectives

1. The student will be able to list 5 types of service offices with 80 percent accuracy within 5 minutes.

2. The student will be able to list 5 skills required in service offices with 80 percent accuracy within 5 minutes.

3. The student will be able to answer 7 questions about the requirements for legal typing with 85 percent accuracy within 5 minutes.

4. The student will be able to list 3 qualifications that must be met in order to become a notary public with 90 percent accuracy within 5 minutes.

5. The student will be able to list the 5 procedures for applying for notary certification with 80 percent accuracy within 5 minutes.

6. The student will be able to answer 4 questions about the responsibilities of a notary public with 75 percent accuracy within 5 minutes.

7. Given a form used in a service office, the student will be able to type the correct data in the appropriate places with 90 percent accuracy within 20 minutes.

8. Given a case situation for a service office, the student will be able to compose and type a mailable letter with 95 percent accuracy within 40 minutes.

9. Given longhand copy, the student will be able to type a medical or legal document in correct format with 90 percent accuracy within 20 minutes.

10. Given oral or machine dictation, the student will be able to type a mailable legal or medical letter in the style specified within 15 minutes.

COMPETENCIES

1. Describe types of service offices
2. List skills required in service offices
3. Describe requirements for legal typing
4. List qualifications for becoming a notary
5. Describe procedures for becoming a notary
6. Describe responsibilities of a notary
7. Type forms used in service offices
8. Compose and type a letter to a client
9. Type medical and legal documents from longhand copy
10. Type legal or medical letters from oral or machine dictation

NOTES TO THE INSTRUCTOR

1. Prior to writing this unit, the author visited several offices in the categories covered and talked with secretaries about their duties. This unit is intended to give a general introduction to the types of activities performed in service offices. It is NOT intended to provide specific training for any one of these offices. Instructors may direct interested students to other materials designed to train them in areas such as medical or legal as well as to education programs in nearby colleges and universities. The categories of offices covered in this unit are representative of service-oriented offices and not meant to represent a thorough coverage of all service offices.

2. Many routine typing duties once done in offices are now being accomplished using a computer. Most insurance forms and policies are computer generated. The use of a computer, computer terminal, and/or a word processor was very common in the offices visited. Since the operations performed using this technology are different in each office, assignment sheets are not provided for computer activities. If students have good keyboarding skills, they can quickly learn to operate the keyboard equipment in a specific office.

3. Before beginning this unit, students should complete Unit I (Typing Review), Unit II (Written Communications), Unit III (Office Style Dictation and Transcription), and Unit VIII (Oral Communications).

4. Many government offices require a civil service rating. The instructor may wish to locate the nearest office where students take the civil service examination. The instructor may also wish to provide students with information about this examination.

5. The section on notary certification has been included because notarization is an important service provided in many of the offices.

6. The federal courts require use of 8 1/2" x 11" paper. Missouri courts will also have this requirement in the near future. Check with your Circuit Clerk or other court officer to determine current requirements.

7. The instructor should point out to students that both legal and medical areas require specialized training since both areas have difficult and extensive vocabularies which secretaries need to know. The other types of offices covered in this unit require general secretarial skills, with additional training usually provided on the job.

8. Included in this lesson are several Assignment Sheets with letters to be dictated by the instructor. The instructor may wish to dictate these and make them available to students on a tape.

9. The posttest in this unit may require more than one class period.

REFERENCES

I. Books and Pamphlets

A. House, Clifford R. and Sigler, Kathie. Reference Manual for Office Personnel, 6th ed. Cincinnati, OH: South-Western Publishing Company, 1981.

B. Insurance Information Institute, various pamphlets, 110 William Street, New York, NY 10038

C. Missouri Notary Public Handbook. Jefferson City, MO: Missouri Secretary of State, 1981. (Available in County Clerk's Office.)

D. Sabin, William A. The Gregg Reference Manual. 6th ed. Manchester, MO: McGraw-Hill Book Company, 1985.

E. So You Want to be a Legal Secretary. Tulsa, OK: National Association of Legal Secretaries.

F. Talking with Patients. Monroe, WI: American Medical Association.

G. Winning Ways with Patients. Monroe, WI: American Medical Association.

SUGGESTED ACTIVITIES

I. Instructor

A. Present materials to class.

B. Arrange for field trips and/or guest speakers.

C. Provide supplemental materials.

D. Duplicate handouts. Each student will need 3 copies of HO-6 and HO-7 and 1 copy of all other handouts. (If Posttest 2 is also given, each student will need 1 extra copy of HO-6.)

E. Have students complete selected Assignment Sheets.

F. Give posttest.

G. If students do not score well on posttest, give additional assignments prior to giving second posttest.

II. Student

A. Read objectives and information sheets.

B. Complete Assignment Sheets.

C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Handouts

A. HO 1: Promissory Note
B. HO 2: Extension Agreement
C. HO 3: Loan Disclosure Statement
D. HO 4: Family Services Form (Front)
E. HO 5: Family Services Form (Back)
F. HO 6: Food Stamp Form
G. HO 7: Requisition Form
H. HO 8: Letters Testamentary
I. HO 9: Health Insurance Claim Form

IV. Transparency Masters

A. TM 1: Service Offices
B. TM 2: Skills Required in Service Offices
C. TM 3: Quitclaim Deed
D. TM 4: Corrections in Legal Typing
E. TM 5: Legal Correspondence
F. TM 6: Letters Testamentary
G. TM 7: The Notary Seal and Stamp
H. TM 8: A Notary Public
I. TM 9: Treat All Patients Equally
J. TM 10: Managing Medical Terms
K. TM 11: A Case History Format

V. Assignment Sheets and Answers

A. AS 1: Service Offices
B. AS 2: Promissory Note Completion
C. AS 3: Loan Disclosure Statement
D. AS 4: Extension Agreement
E. AS 5: Composing a Welcome Letter
F. AS 6: Composing an Insurance Form Letter
G. AS 7: Family Services Form
H. AS 8: Food Stamp Form Message
I. AS 9: Supplies Requisition

J. AS 10: Typing a Legal Document from Longhand Copy
K. AS 11: Transcribing Legal Correspondence
L. AS 12: Completing a Legal Form
M. AS 13: The Notary Seal
N. AS 14: Greeting Patients and Answering the Telephone
O. AS 15: Transcribing Medical Correspondence
P. AS 16: Preparing a Universal Claim Form
Q. AS 17: Typing a Case History from Longhand Copy

VI. Two Posttests and Keys

INFORMATION SHEET

I. Service Offices Requiring General Secretarial Skills (TM 1)

  A. Financial institutions

    1. Banks
    2. Savings and loan institutions
    3. Credit unions
    4. Stock and bond brokers
    5. Investment services

  B. Insurance offices

    1. Independent insurance agents
    2. Automobile
    3. Life
    4. Health
    5. Home--property
    6. Business

  C. Government offices

    1. Federal

      a. Post Office
      b. Agricultural Stabilization and Conservation
      c. Military recruiting offices
      d. Social Security
      e. Soil Conservation Office

    2. State

      a. Bureau for the Blind
      b. Department of Revenue, Motor Vehicles, Marine and Driver Licensing
      c. Department of Conservation
      d. Division of Employment Security
      e. State Highway Department
      f. State Probation and Parole District Office

        3. County

            a. County Court
            b. Sheriff's Office
            c. Division of Family Services
            d. County Engineer
            e. OATS
            f. Show-Me Regional Planning

        4. City

            a. Street Department
            b. Parks Department
            c. Housing Authority
            d. Building Inspector
            e. City Clerk
            f. City Collector
            g. City Manager
            h. Fire Department
            i. Police Department

II. General Skills Required in Service Offices (TM 2)

    A. Human relations skills

        1. Pleasant, helpful attitude

        2. Empathy

        3. Pleasant appearance

        4. Good telephone voice and manners

    B. Typing skills

        1. Knowledge of letter styles

        2. Ability to use references

        3. Ability to type data on forms

        4. Ability to type from longhand copy

    C. Ability to compose simple letters

    D. Ability to transcribe from machine or oral dictation

    E. Ability to use a microcomputer or an on-line computer terminal

        1. Enter data

        2. File data

        3. Retrieve data

        4. Update data

        5. Select data for billing or other purposes

    F. Ability to use a word processor

        1. Create documents

        2. Set up documents requiring variable data

        3. Store documents

        4. Retrieve and print documents

        5. Edit and change documents

III. Service Offices Requiring Specialized Training (in addition to skills listed in II)

    A. Legal services

        1. Typing legal documents (TM 3)

            a. Margins

                1) Side margins--2 spaces inside ruled lines or 1 1/2" left and 1/2" right
                2) Top margins--2" on first page; 1 1/2" on following pages; or adjust to fit document
                3) Bottom margins--1"

            b. Spacing

                1) Most data generally double-spaced
                2) Land descriptions and other special items single-spaced

            c. Paragraph indentions

                1) Generally 10 spaces
                2) May be 5 spaces

            d. Page numbers

                1) Centered 1/2" from bottom of page (none on page 1)
                2) Acceptable styles: -2-, 2, Page 2, two
                3) First page of a will may be numbered Page 1 of 3 (for a 3-page will);
                4) Following pages numbered Page 2 of 3, Page 3 of 3, etc.

- e. Document title
    - 1) Centered in all caps between margins
    - 2) Followed by a triple-space

- f. Signature lines
    - 1) Begin first signature line on third or fourth line below last document line.
    - 2) Type at least 2 lines of document on page containing signatures.
    - 3) Witnesses sign at left.
        - a) Begin at left margin.
        - b) Type line 3" long.
    - 4) Parties sign at right.
        - a) Begin at center of line of type.
        - b) Type line 3" long.
    - 5) If terms "Seal" or "L.S." are placed at end of line, line is 2 1/2" long.
    - 6) Leave 2-3 blank lines between signature lines.

- g. Amounts
    - 1) Usually typed twice--first spelled out, then in figures enclosed in parentheses
    - 2) Numbers may be capitalized or lower case

- h. Corrections (TM 4)
    - 1) Neat corrections generally allowed
    - 2) No corrections in amounts, dates, names
    - 3) No corrections in a will

2. Typing legal correspondence (TM 5)

- a. Letter style is determined by office.

- b. Any acceptable style may be used.

- c. Special features
    - 1) RE line indicates subject.
    - 2) Corrections should not be noticeable.
    - 3) No corrections are allowed in names or numbers.
    - 4) Signature block may include name of firm.

3. Typing legal forms (TM 6)

    a. Legal forms are called law blanks.

    b. Study forms before typing.

    c. Data is usually single-spaced.

    d. Set margins to fit those of form.

    e. Block most data.

    f. Typing should be well aligned with lines or blank spaces.

4. Applying for a notary seal (TM 7, TM 8)

    a. Qualifications for notary public

        1) Citizen of U.S.
        2) 18 years of age or older
        3) Registered voter in county
        4) Resident of county
        5) Resident of state for 1 year
        6) Read and write English language
        7) Commission not revoked during last 10 years

    b. Applying for seal

        1) Obtain application from County Clerk (also available from Secretary of State).
        2) Complete application and take to County Clerk.
        3) Take oath of office.
        4) Sign signature card.
        5) Provide $10,000 bond.
        6) Purchase notary seal and stamp.

    c. Responsibilities of a notary public

        1) Any document may be notarized.
        2) Notary should require identification of person signing document.
        3) Document must be signed in presence of notary.
        4) Notary may also take acknowledgements.
        5) Notary may administer oaths and affirmations.
        6) Notary may certify that a copy of a document is a true copy of another document.
        7) Notary must keep journal of notarial acts.
        8) Certification is good for 4 years, after which notary may reapply.

B. Medical Services (TM 9)

1. Greeting patients
    a. Verify appointment--check appointment book.
    b. Make each patient feel important.
    c. New patients should complete information sheet.
    d. Maintain calm, reassuring attitude--even when faced with difficult patients.
    e. Treat patients equally--those with wounds, deformaties, or obvious handicaps should be greeted without stares.
    f. Don't give opinions or medical advice.

2. Handling telephone calls
    a. The telephone is a vital link between doctor and patient.
    b. Learn when doctor(s) may be interrupted.
    c. Answer all calls promptly.
    d. Practice a pleasant telephone voice.
    e. Identify office.
    f. Determine caller's need; respond accordingly.
        1) Transfer to doctor.
        2) Take message.
        3) Make appointment.
        4) Get medical record if needed.
    g. For emergency call, record accurate data:
        1) Name
        2) Address
        3) Telephone number
        4) Problem

3. Typing medical correspondence (TM 10)
    a. Any letter style may be used.
    b. Medical terms require special attention.
        1) Use up-to-date medical dictionary.
        2) Break long terms into syllables.
        3) Double check spelling.

4. Typing medical forms
    a. Medical offices use many forms.
    b. Data should be correct. (Double check amounts, names, terms.)
    c. Typing should be slightly above lines, typed neatly in spaces provided.

5. Typing case histories (TM 11)

   a. Double check accuracy of data.
   b. Use medical dictionary.
   c. Office will specify format to be used.

HO 1

PROMISSORY NOTE

$ ________________ ____________, Missouri __________, 19 __

________________________, FOR VALUE RECEIVED, the undersigned, jointly and severally, promise to pay to ____________________, or order, at the office of said Bank in ____________________, Missouri, or such other place as the holder hereof may in writing direct, the sum of ________________________________ Dollars ($____________), with interest from the date hereof until paid at the rate of __________ percent per annum, interest payable ____________________________.

If default be made in the payment of principal or interest when due, the entire unpaid principal balance hereof, together with interest thereon, shall, without notice, become immediately due and payable at the option of the holder hereof. Failure to exercise such option shall not constitute a waiver of the right to exercise it in the event of any such subsequent default.

The makers, endorsers, guarantors, and all other persons now or to become liable on this note each waive demand, notice and protest, and consent to any and all renewals or extensions in the time of payment hereof.

The makers, endorsers, guarantors, and all other persons now or to become liable on this note each guarantee to pay all costs of collection, including a reasonable attorney's fee, if this not be placed in the hands of an attorney for collection.

____

____

Unsecured Single Payment or Demand Note.
Simple Interest

HO 2

EXTENSION AGREEMENT

Note No. ______________ ______________________________
(City) (State)

$ ____________ Date ____________________ 19 ___

IT IS HEREBY AGREED that the above numbered note, or payment, on which there is an unpaid balance of ____________________________________ Dollars, shall be and is hereby extended to become due _______________
(Explain)
____

and the undersigned, in consideration of the extension of time for payment, does hereby agree to pay a fee of $ ______________ and further agrees to pay the said note, or payment, as above specified together with interest at the rate of ____________ percent per annum, payable ______________________________ from __________________,
Explain - (Monthly - Semi-Annually)
19 ___ until the maturity as herein specified and at the rate of percent per annum, from maturity until fully paid. All terms and conditions of the original note and any security thereto attached is fully incorporated herein and fully ratified except as specifically modified by this renewal agreement.

By executing this Extension Agreement, the undersigned acknowledge receipt of a completely filled-in copy prior to execution.

_________________________ _______________________________
(Creditor) (Customer)

By _______________________ _______________________________
(Title) (Customer)

LOAN DISCLOSURE STATEMENT

Creditor	Borrower(s)
Date	Address
Description of Loan	

ANNUAL PERCENTAGE RATE	FINANCE CHARGE	Amount Financed	Total of Payments
The cost of your credit as a yearly rate.	The dollar amount the credit will cost you.	The amount of credit provided to you or on your behalf.	The amount you will have paid when you have made all scheduled payments.
%	$	$	$

You have the right to receive at this time an itemization of the Amount Financed.

_____ I want an itemization. _____ I do not want an itemization.

Your payment schedule will be:

Number of payments	Amount of Payments	When Payments Are Due

This obligation ☐ is payable on demand. All disclosures are based on an assumed maturity of one year.

☐ has a demand feature.

Insurance: Credit life insurance and credit disability insurance are not required to obtain credit, and will not be provided unless you sign and agree to pay the additional cost.

Type	Premium	Signature
Credit Life		I want credit life insurance. ____________ Signature
Credit Disability		I want credit disability insurance. ____________ Signature
Credit Life and Disability		I want credit life and disability insurance. ____________ Signature

LOAN DISCLOSURE STATEMENT (page 2)

You may obtain property insurance from anyone you want that is acceptable to creditor. If you get the insurance from creditor, you will pay $__________.

Late Charge: If a payment is late, you will be charged ______________________________.

Security: You are giving a security interest in:

☐ the goods or property being purchased. ☐ __________________________________.
(brief description of other property)

Collateral securing other debts with us may also secure this loan.

Prepayment: If you pay off early, you

☐ may ☐ will not have to pay a penalty.
☐ may ☐ will not be entitled to a refund of part of the finance charge.

☐ Assumption: Someone buying your house ☐ may, subject to conditions, be allowed to ☐ cannot assume the remainder of the mortgage on the original terms.

Filing Fees: $__________ Non-filing Insurance: $__________

☐ The annual percentage rate does not take into account your required deposit.

See your contract documents for any additional information about nonpayment, default, any required repayment in full before the scheduled date, and prepayment refunds and penalties.

e means an estimate

RECEIPT OF A COPY OF THIS DISCLOSURE IS HEREBY ACKNOWLEDGED.

____

____

158

HO 4

FAMILY SERVICES FORM

STATE OF MISSOURI
DEPARTMENT OF SOCIAL SERVICES
DIVISION OF FAMILY SERVICES

COUNTY OFFICE: ______________________

____

MISSOURI

____
DATE

COUNTY DIRECTOR: ______________________

PHONE: ______________________

(COUNTY OFFICE USE ONLY)
(This is NOT a Medicaid No. in this Section—See Back Side For Medicaid No.)

CASE NAME: ______________________

CASE NUMBER: ______________________

CASE NUMBER: ______________________

Dear

This is to advise you that your application for ______________________ has been approved. On the basis of our investigation of your income and expenses, which you helped provide, we find that:

1. ☐ your monthly check will be $ __________. This is based on income before taxes of $ __________ per __________.
2. ☐ you have $ __________ of your own income which could be applied toward your medical expenses. Since your medical expenses have exceeded this amount, you now qualify for medical assistance coverage through __________.
   If you wish medical coverage beyond this date, you must reapply after __________ *(Date)* and if possible before __________ *(Date)* 19 ____.
3. ☐ you have been approved for Title XIX (Medical) coverage only (no cash grant).
4. ☐ the assistance grant (from box 1) is determined without considering child support or alimony as direct income to the household. Therefore, as of __________ *(Date)* it will be required that all child support and alimony received by you must be sent to the Support Enforcement Agency located at ______________________.
5. ☐ other: ______________________

____

All assistance checks and/or medicaid card, are mailed directly to you from the office of the Division of Family Services in Jefferson City. You may expect to receive your first check approximately two weeks from the date of this letter.

The Federal Law requires that family planning services be made available to persons receiving Aid to Families with Dependent Children. The services which are available can be explained at the County Office. These family planning services are entirely voluntary, and no one has to accept the services unless he or she desires them.

We are enclosing a leaflet which contains important information about your assistance. Please read it carefully and keep it for future reference.

To be sure that your check, and/or medicaid card, will be delivered on time each month it is very important that you inform us immediately when you move or change your address.

IF YOUR SITUATION CHANGES IT IS YOUR RESPONSIBILITY UNDER THE LAW TO REPORT THESE CHANGES AT ONCE TO THE LOCAL COUNTY OFFICE. THE LAW PROVIDES PENALTIES FOR ANY PERSONS WHO RECEIVE BENEFITS TO WHICH THEY ARE NOT ENTITLED THROUGH MISREPRESENTING THE FACTS OR NOT REPORTING FULL INFORMATION ABOUT THEIR SITUATION.

Enclosure: Information
Leaflet(s) No. _____

Sincerely,

____
CASEWORKER

IMPORTANT: THE BACK OF THIS LETTER IS VERIFICATION OF YOUR MEDICAL COVERAGE.

175 159

RETAIN CURRENT FORM

HO 5

FAMILY SERVICES FORM (page 2)

This letter will also serve to verify eligibility for medical services for the persons listed below until their regular medicaid card is received.

GENERAL RELIEF CASE: Yes_ No_ LOCK-IN CASE: Yes_ No_

ELIGIBLE FOR MEDICAID (TITLE XIX) BENEFITS

NAME (Last)	(First)	(Middle)	Emerg Rm Out-patient Clinic Restriction	Five Prescription Limit	MEDICAID NO.	Period of Coverage FROM	TO
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			
			A B	☐☐☐☐☐			

O THE VENDOR: EMERGENCY ROOM/OUTPATIENT RESTRICTION: Each time services, other than exempted services, are given in an outpatient Clinic or Emergency Room, you must circle a letter ("A"– first non-exempt visit and "B"– second exempt visit) indicated in the "E.R./Outpatient Clinic Restriction." If both "A & B" are circled the claimant is not eligible for further non-exempt services, in the current month.

IVE PRESCRIPTION LIMITATION: Each time you fill or refill a Title XIX, covered prescription, you must mark one of the prescription limitation boxes, to indicate the number of individual prescriptions the claimant has received, and for which Title XIX will pay. If all five (5) boxes are marked, the claimant is not eligible for further Title XIX payment of drug charges in the current month.

OR COUNTY OFFICE USE:

The beginning date of Title XIX eligibility for all categories of assistance except where the spenddown requirement must be met in MA Cases, is as follows:

1. The first day of the month of application; OR
2. The first day of the third month prior to the month of application provided the applicant met eligibility requirements for assistance during this three months; OR

   If the claimant became eligible for assistance sometime during the three month period, eligibility for Title XIX will begin on the 1st day of the month in which the claimant was determined eligible for assistance; OR
3. The 1st day of the month that eligibility for assistance was established for each member of the assistance group; OR
4. The date the spenddown requirement was met in MA cases.
5. For newborns, eligibility for Title XIX cannot precede the date of the child's birth.

he expiration date for Title XIX eligibility will be the last day of the month of coverage, OR

AFDC, NC, MA –	–	The 4th day of the month following the month of approval.
GR, FC, (AFDC-FC-UM)	–	The 9th day of the month following the month of approval.
SUPP-AB, BP, Conversion Cases	–	The 14th day of the month following the month of approval.

This date allows for mailing time from State Office and to provide for continuous coverage until the Title XIX Card is received.

NOTE: For MA spenddown cases, if the claimant will not receive a Title XIX Card from State Office before the Medicaid quarter ends, the expiration date will be the last day of each month, in the current quarter, for which an authorization letter is issued.

MEDICAID-LOCK-IN PROGRAM

☐ Physician ☐ Pharmacy ☐ Optometrist ☐ Dentist ☐ Podiatrist ☐ O.P.—E.R. Facility

Name:
Address:
City & State:

Name: 160
Address:
City & State:

FOOD STAMP FORM

HO 6

Notice of Eligibility, Denial or Pending Status

Case number ____________________

Action Taken on Your Food Stamp Case

FORM APPROVED OMB NO 40 R4855

Date ____________________

Name ____________________

Address ____________________

____

Dear ____________________

We're writing to tell you about the action we've taken on your food stamp case. We've explained our action next to the box(es) marked.

☐ You'll receive food stamp benefits during the month(s) of:

____________________.

The first month you'll receive __________ which covers the month(s) of: ____________________.

After this first month you'll receive ____________________

____________________.

☐ Because you needed food stamp benefits right away, we postponed asking you to give us certain information. We now need you to bring or mail in the following information:

____

____

☐ Your application has not been approved because: ______

____

____

____

☐ You didn't do everything required for us to find out if you are eligible for food stamps. Here's what you still need to do:

____

____

If you do this by ____________________, you won't have to reapply.

You can have a fair hearing of your case if you don't agree with our decision. At the hearing you'll have a chance to explain why you disagree. A hearing officer will decide who's right.

To request a fair hearing call the food stamp office at ______ ____________________ or fill out and return the form below. You can also call this number if you want to know more about how a fair hearing works or to find out if free legal advice is available.

Sincerely,

- -

If you want a fair hearing, fill out this form, tear it off, and mail to:

ORANGE COUNTY FAMILY SERVICES
109 N. Broadway P.O. Box 675
Centertown, MO 65804

____
Name of person requesting hearing

____
Address

____
Telephone number where you can be reached

Your signature

Today's date

____
[illegible] this space to tell us why you want a fair hearing

____

FOR OFFICE USE ONLY.

Case number	Case worker	Date notice sent	Date request received

FOOD STAMP FORM (page 2)

PLEASE NOTE:

LISTED BELOW IS THE GROSS AMOUNT OF INCOME WE HAVE USED IN DETERMINING YOUR ELIGIBILITY FOR FOOD STAMPS. IF ANY PART OF THIS LIST IS IN ERROR, PLEASE CONTACT YOUR CASEWORKER.

If the source of your income, the amount of the income we have shown below or the amount of the deductions we have allowed changes, you must:

☐ **report the changes on the next monthly status report form (MSR–1) you receive.**

☐ **report the changes to us using the Notice of Change Form (IM-145) or by phone or in person.**

☐ **report any change when the change is more than $25.00 per month or more than $5.77 per week.**

INCOME WE HAVE COUNTED

Social Security: ____________

Supplemental Security Income (SSI): ____________

Any Income From Family Services Such as AFDC, etc.: ____________

Earnings From Wages or Salaries: ____________

Earnings From Interest: ____________

Earnings From Stocks and/or Bonds: ____________

Contributions From Others: ____________

Other Income: ____________

Total Gross Income: $____________

ALLOWABLE DEDUCTIONS

Standard Deduction: ____________

Earned Income Deduction: ____________

Child/Dependent Care: ____________

Excess Shelter: ____________

Medical Expenses: ____________

Other: ____________

Total Deductions: $ ____________

TOTAL NET INCOME: $____________

VERIFICATION NEEDED

Your application was approved for the months of ____________ and ____________ without verification of ____

____

____.

You will not receive food stamps for____________until we receive the above verification. If the verification results in changes in your household's eligibility or amount of your food stamps, we will make the change without advance notice of adverse action.

WAIVER OF NOTICE OF ADVERSE ACTION

If you have also made application for AFDC or other Public Assistance and the other application is later approved, your food stamp benefits may be reduced or terminated when your payment is received. We will make this change without advance notice of adverse action.

162

HO 7

Department of Social Services

REQUISITION FORM

Date Rec'd. __________

Buyer Date __________

Group A ☐ Group B ☐

SAM No. __________

Date Proc'd. __________

Est. Delivery __________

PURCHASING USE ONLY

FY __________

NEW ☐ }check one box only
USED ☐

DIVISION __________

SECTION __________
Institution, County, Region, District, Program, Bureau

DELIVERY ADDRESS __________
Number and Street, P.O. Box, City, Zip

EXPENDITURE CHARGED TO __________
Agency, Cost Center, Object, Project/Grant

VENDOR INFO. __________
Vendor, Vendor Address, Vendor Number, Contract Number

____

Description	Item No.	Quantity Ordered	Unit	Unit Price	Amount	Commen

ACCOUNTING USE ONLY

INTERFACE CODE __________ __________

ACCT. NOs. __________ __________

__________ __________

REQUESTED BY __________ Please PRINT or TYPE

APPROVED BY __________

TITLE __________ Phone No.

TITLE __________

DATE __________

DATE __________

DOF 1 - REV. 8/83 WHITE - Finance YELLOW - Requestor Returned PINK - Requestor

IN THE CIRCUIT COURT OF ORANGE COUNTY, MISSOURI
PROBATE DIVISION

IN THE ESTATE OF

...., Deceased.

ESTATE NUMBER ....

LETTERS TESTAMENTARY

(Sec. 473.117-473.123, RSMo.)
(Supervised Administration)
(Resident Fiduciary)

THE STATE OF MISSOURI TO ALL PERSONS TO WHOM THESE PRESENTS SHALL COME, GREETING: KNOW YE,

That the last Will and Testament of ...., deceased, who resided in ....and died ...., has been exhibited, proved and recorded; to the end that the property of the decedent may be collected and disposed of, we do hereby appoint .... Personal Representative, with full power and authority as provided by law.

IN TESTIMONY WHEREOF, I, Division Clerk of the Probate Division of the Circuit Court in and for the said County of Orange, have hereunto signed my name and affixed the seal of the said court at my office in Centertown, Missouri on

....

(Seal)

....
Division Clerk

By ....
Deputy Division Clerk

HO 9

HEALTH INSURANCE CLAIM FORM

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

TYPE OR PRINT ☐ MEDICARE ☐ MEDICAID ☐ CHAMPUS ☐ OTHER

PATIENT & INSURED (SUBSCRIBER) INFORMATION

1 PATIENT'S NAME (First name, middle initial, last name)

2 PATIENT'S DATE OF BIRTH

3 INSURED'S NAME (First name, middle initial, last name)

4 PATIENT'S ADDRESS *(Street, city, state, ZIP code)*

5 PATIENT'S SEX
MALE ☐ ☐ FEMALE

6 INSURED'S I.D. No. or **MEDICARE No.** *(include any letters)*

7 PATIENT'S RELATIONSHIP TO INSURED
SELF ☐ SPOUSE ☐ CHILD ☐ OTHER ☐

8 INSURED'S GROUP NO. *(Or Group Name)*

9 OTHER HEALTH INSURANCE COVERAGE - Enter Name of Policyholder and Plan Name and Address and Policy or Medical Assistance Number

10 WAS CONDITION RELATED TO:
A PATIENT'S EMPLOYMENT
YES ☐ ☐ NO
B AN AUTO ACCIDENT
YES ☐ ☐ NO

11 INSURED'S ADDRESS *(Street, city, state, ZIP code)*

12 PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE *(Read back before signing)*
I Authorize the Release of Any Medical Information Necessary to Process this Claim and Request Payment of MEDICARE CHAMPUS Benefits Either to Myself or to the Party Who Accepts Assignment Below
SIGNED DATE

13 I authorize payment of medical benefits to undersigned physician or supplier for service described below
SIGNED (Insured or Authorized Person)

PHYSICIAN OR SUPPLIER INFORMATION

14 DATE OF ◀ ILLNESS (FIRST SYMPTOM) OR INJURY (ACCIDENT) OR PREGNANCY (LMP)

15 DATE FIRST CONSULTED YOU FOR THIS CONDITION

16 HAS PATIENT EVER HAD SAME OR SIMILAR SYMPTOMS?
YES ☐ ☐ NO

17 DATE PATIENT ABLE TO RETURN TO WORK

18 DATES OF TOTAL DISABILITY
FROM THROUGH

DATES OF PARTIAL DISABILITY
FROM THROUGH

19 NAME OF REFERRING PHYSICIAN

20 FOR SERVICES RELATED TO HOSPITALIZATION GIVE HOSPITALIZATION DATES
ADMITTED DISCHARGED

21 NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED *(if other than home or office)*

22 WAS LABORATORY WORK PERFORMED OUTSIDE YOUR OFFICE?
YES ☐ ☐ NO CHARGES

23 DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. RELATE DIAGNOSIS TO PROCEDURE IN COLUMN D BY REFERENCE TO NUMBERS 1, 2, 3, ETC. OR DX CODE

1
2
3
4

24 A DATE OF SERVICE	B • PLACE OF SERV-ICE	C FULLY DESCRIBE PROCEDURES, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN PROCEDURE CODE (IDENTIFY)	*(EXPLAIN UNUSUAL SERVICES OR CIRCUMSTANCES)*	D DIAGNOSIS CODE	E CHARGES	F

25 SIGNATURE OF PHYSICIAN OR SUPPLIER *(Read back before signing)*
SIGNED DATE

26 ACCEPT ASSIGNMENT (GOVERNMENT CLAIMS ONLY) SEE BACK
YES ☐ ☐ NO

27 TOTAL CHARGE

28 AMOUNT PAID

29 BALANCE DUE

30 YOUR SOCIAL SECURITY NO

31 Physicians or suppliers name, address, zip code & telephone no.

I.D. NO

32 YOUR PATIENT'S ACCOUNT NO

33 YOUR EMPLOYER I.D. NO

•PLACE OF SERVICE CODES

1 — (IH) — INPATIENT HOSPITAL
2 — (OH) — OUTPATIENT HOSPITAL
3 — (O) — DOCTOR'S OFFICE
4 — (H) — PATIENT'S HOME
5 — DAY CARE FACILITY (PSY)
6 — NIGHT CARE FACILITY (PSY)
7 — (NH) — NURSING HOME
8 — (SNF) — SKILLED NURSING FACILITY
9 — AMBULANCE
O — (OL) — OTHER LOCATIONS
A — (IL) — INDEPENDENT LABORATORY
B — OTHER MEDICAL SURGICAL FACILITY

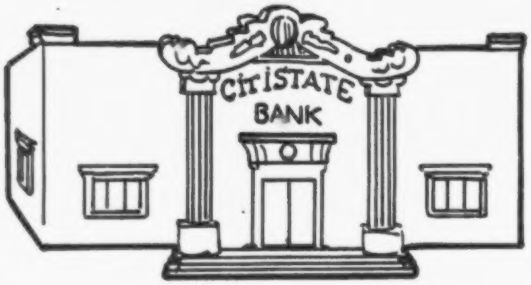
#1 A9390 — Medical Arts Press, Mpls., Mn. 55427

APPROVED BY AMA COUNCIL ON MEDICAL SERVICE 6 74

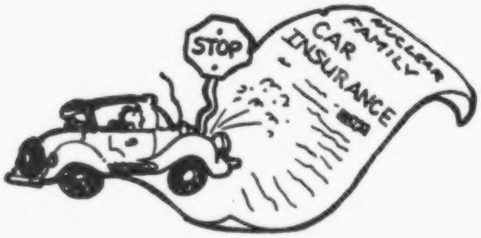
TM 1

Service Offices

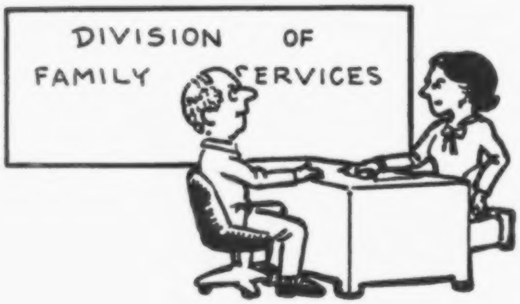
Financial


CITISTATE
BANK

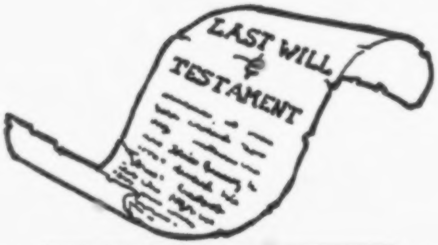
Insurance


STOP
NUCLEAR FAMILY
CAR
INSURANCE

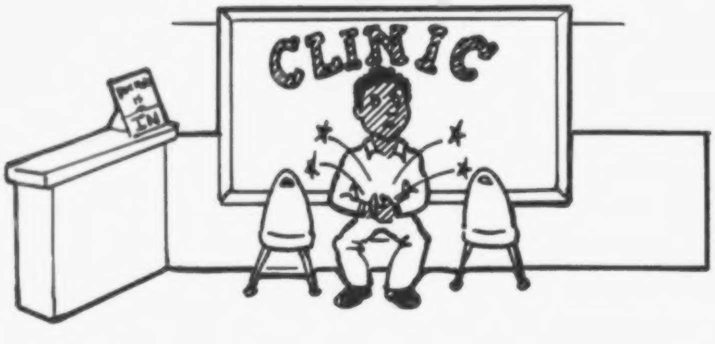
Government


DIVISION OF
FAMILY SERVICES

Legal


LAST WILL
&
TESTAMENT

Medical



Skills Required in Service Offices

Human Relations Skills

Typing Skills

Written Communication Skills

Transcription Skills

Computer Skills

Word Processing Skills

TM 3

1½" ↓

← 1½" →

½" ←

QUITCLAIM DEED ← **centered**

TS

→ **10** KNOW ALL MEN BY THESE PRESENTS:

That JAMES JEFFERSON of the County of Gonzales and the State of Missouri, for and in consideration of one dollar, and twenty (20) head of longhorn cattle, paid by SAM EVANS of the County of Gonzales and the State of Missouri, bargained, sold, quitclaimed, and released, and by these presents does bargain, sell, quitclaim, and release, unto JAMES JEFFERSON all the right, title, and interest and estate in the property described as follows: **DS**

→ **10** Lot Six (6) in the Orange Grove Subdivision in Block Twenth-Three (23) in Rolling Hills Addition to the city of Gonzales, State of Missouri, as per recorded in Book "B" of Plats, page 14, in the Office of the Clerk of the County of Gonzales, more particularly described as follows: BEGINNING at the Southwest corner of said lot, thence West Thirteen (13) feet, thence East on a line parallel to the South line of said lot Forty (40) feet, thence West Twelve (12) feet to the Southeast corner of said lot; thence North along the East line of said lot Forth (40) feet to a POINT OF BEGINNING. **SS**

Numbers-typed twice

To HAVE AND TO HOLD the above-described premises unto the Party of the Second Part, his heirs and assigns forever. **DS**

Witness his hand this sixth day of May, 19__.

Signed, and delivered in
the presence of: **SS**

Lines-3" long

________________________ ________________________
WITNESS

________________________ ________________________
WITNESS

Witnesses sign at left

Parties sign at right

Corrections
in Legal Typing

Neat Corrections are Generally Allowed

BUT

No Corrections are Allowable in

...amounts

...dates

...names

...wills

Legal Correspondence

May 29, 1985

Mr. Milton A. Wentworth
2345 Rose Avenue
Maryville, MO 64468

Dear Mr. Wentworth:

DS →

RE: ABC Finance Company v. Lisa Thomas ← **RE line follows salutation**

DS →

I have been retained by Miss Thomas to represent her in the above-entitled action. Since she was served with the summons and complaint on May 15, we will need an additional two-week period in order to file our answer.

As I am sure you realize, Miss Thomas is planning to claim the defense of fraud against your client, ABC Finance.

You may wish to reconsider continuing this action. If your client is willing to accept partial payment of the balance due, we may be able to satisfactorily conclude this action.

Please let us have your confirmation of the extension of time to answer as requested.

Sincerely yours,

Sam Johnson

Sam Johnson
JOHNSON BROTHERS
ATTORNEYS AT LAW ← firm name

rl

IN THE CIRCUIT COURT OF ORANGE COUNTY, MISSOURI
PROBATE DIVISION

IN THE ESTATE OF

.... Deceased.

ESTATE NUMBER ....

LETTERS TESTAMENTARY

(Sec. 473.117-473.123, RSMo.)
(Supervised Administration)
(Resident Fiduciary)

THE STATE OF MISSOURI TO ALL PERSONS TO WHOM THESE PRESENTS SHALL COME, GREETING: KNOW YE,

That the last Will and Testament of ...., deceased, who resided in ....and died .... has been exhibited, proved and recorded; to the end that the property of the decedent may be collected and disposed of, we do hereby appoint .... Personal Representative, with full power and authority as provided by law.

IN TESTIMONY WHEREOF, I, Division Clerk of the Probate Division of the Circuit Court in and for the said County of Orange, have hereunto signed my name and affixed the seal of the said court at my office in Centertown, Missouri on

....

(Seal)

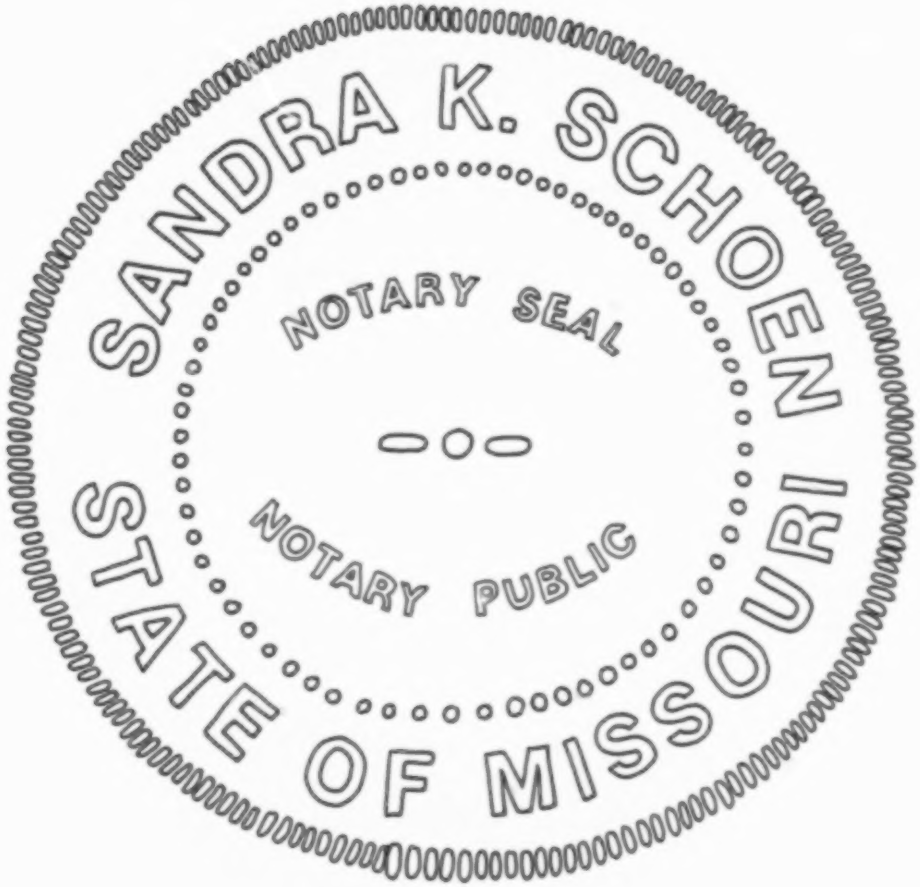
....
Division Clerk

By ....
Deputy Division Clerk

TM 7

The Notary Seal and Stamp

SANDRA K. SCHOEN
Notary Public - State of Missouri
Commissioned in Johnson County
My Commission Expires March 14, 1987


SANDRA K. SCHOEN
STATE OF MISSOURI
NOTARY SEAL
NOTARY PUBLIC

A Notary Public

Qualifications:

- U.S. citizen
- 18 years or older
- Registered voter
- County resident
- State resident
- Read & write English
- Commission not revoked during last 10 years

To Apply:

- Obtain application from County Clerk
- Complete application

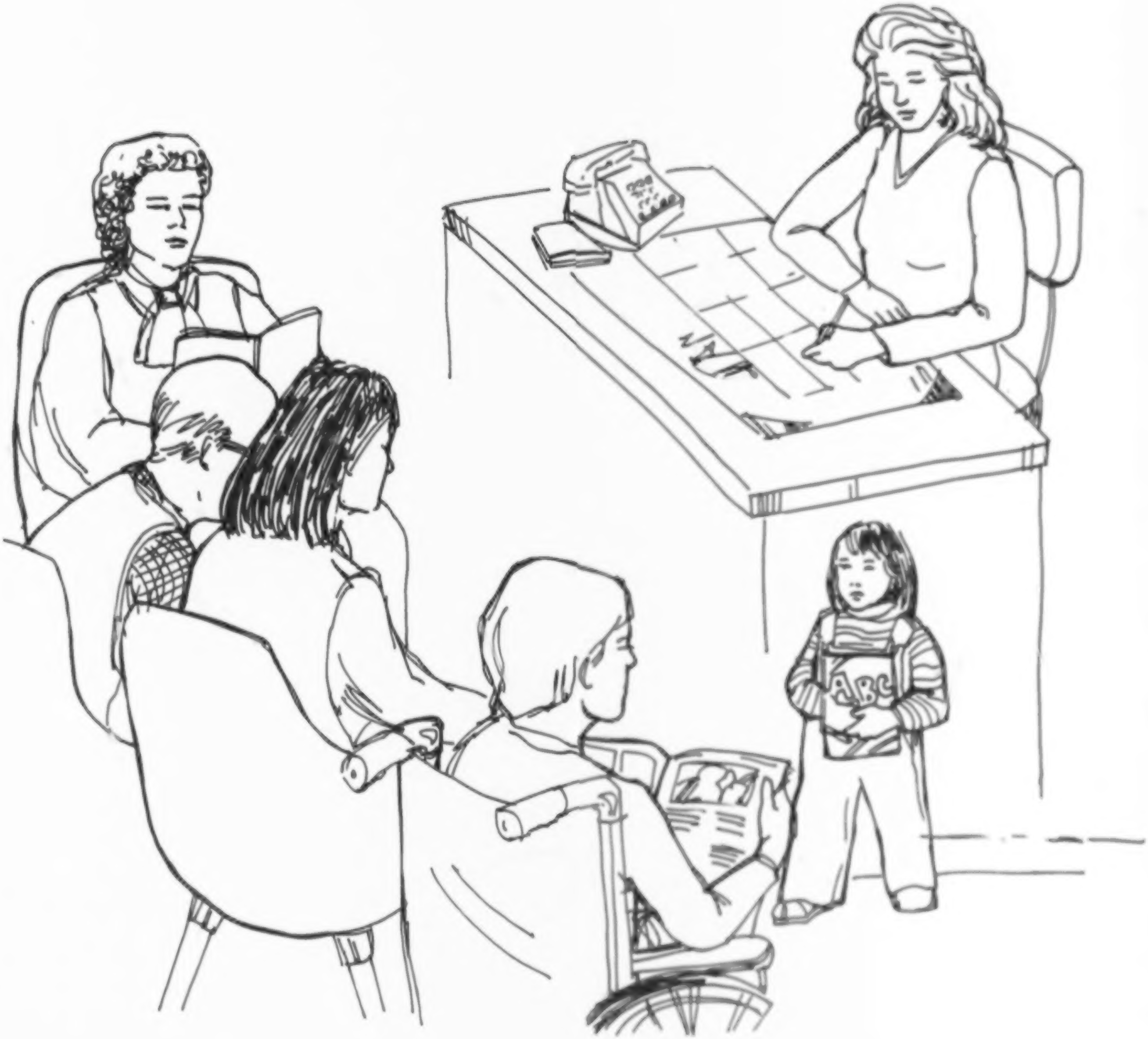
Then:

- Take oath of office
- Sign signature card
- Provide $10,000 bond
- Purchase notary seal and stamp

And:

- Keep a journal of all notarial acts

Treat All Patients Equally



Managing Medical Terms

...Use Medical Dictionaries

Medical Dictionary
medical word finder

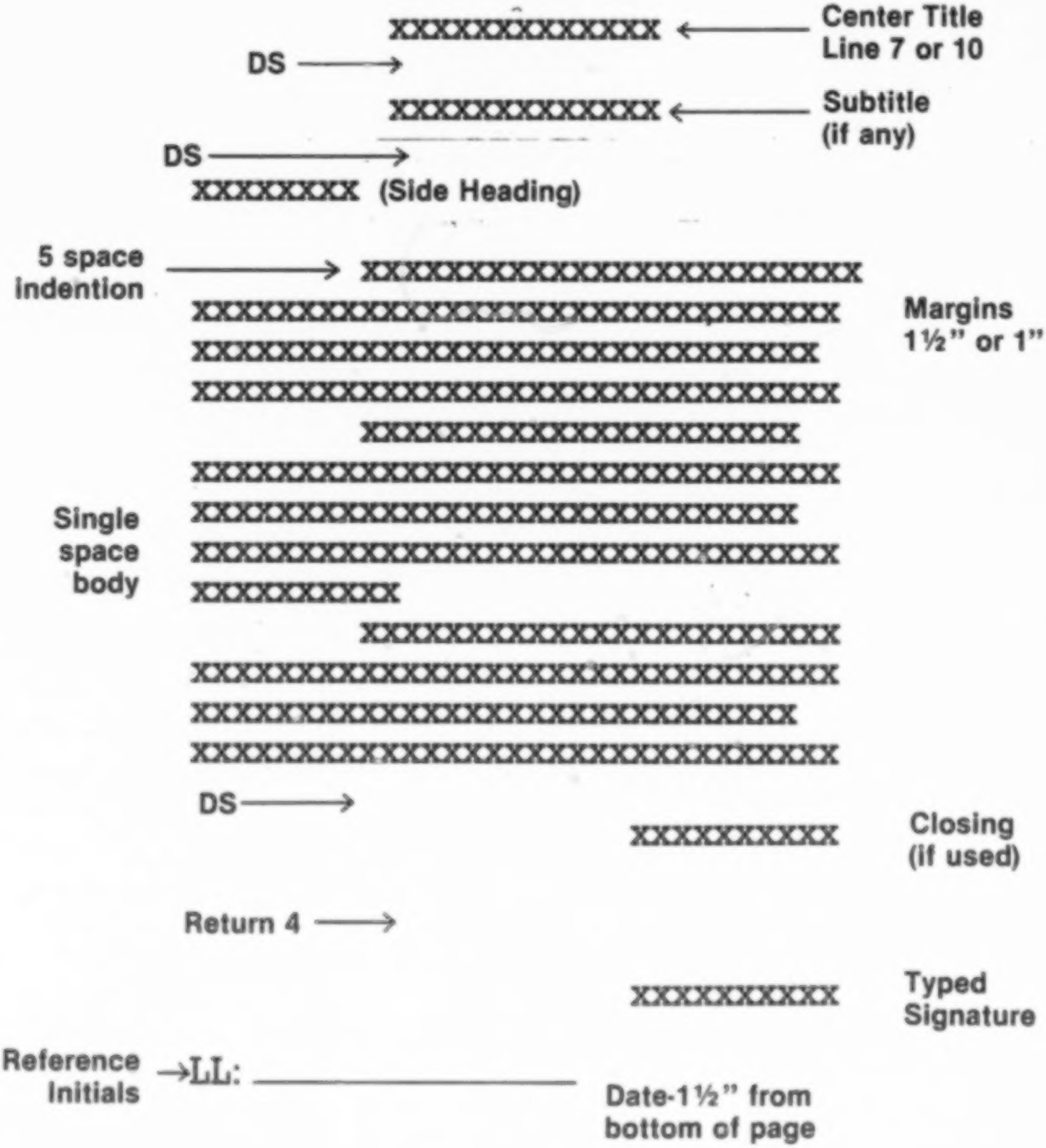
...Break Terms into Syllables

ad-e-noi-dec-to-my
dysp-ne-a
sub-cu-ta-ne-ous

...Double-Check Spelling

A Case History Format

(format will vary from office to office)


Center Title
Line 7 or 10
DS
Subtitle
(if any)
DS
(Side Heading)
5 space
indention
Margins
1½" or 1"
Single
space
body
DS
Closing
(if used)
Return 4
Typed
Signature
Reference
Initials
LL:
Date-1½" from
bottom of page

ASSIGNMENT SHEET 1: Service Offices

Directions: Using a telephone book, survey the service offices in your area. Make a list of at least five offices in each category covered in this unit (financial, insurance, government, legal, medical). Select one office and make arrangements to visit that office and talk with the secretary. Before you visit the office, consult with your instructor about the visit and make out a list of questions you want to ask the secretary. Try to determine what the duties of the secretary are, what entry skills are needed, what skills can be learned on the job and what the secretary likes and dislikes about the job.

Prepare a typed report, approximately two to five pages long.

OPTION: Present your report orally to the class.

ASSIGNMENT SHEET 2: Promissory Note Completion

Directions: Using the following information, fill out a Promissory Note (HO 1).

1. Assume the required copy will be made on a copy machine.
2. Align the typing slightly above the lines.
3. The note is for $2,000.
4. The location is Anytown, Missouri.
5. Use the current date.
6. The MAKER of the note (the one who promises to pay) is Paul D. Wilson.
7. The PAYEE (the one who will be paid) is the Anytown National Bank.
8. The interest rate is 12 percent, and the interest is payable annually.

ASSIGNMENT SHEET 3: Loan Disclosure Statement

Directions: Type the necessary information on the Loan Disclosure Statement (HO 3) for Mr. Wilson's loan (Assignment Sheet 2). Use a capital X to mark boxes.

1. Use the current date.
2. The creditor is the Anytown National Bank.
3. The loan is an unsecured single payment loan.
4. The borrower is Mr. Paul D. Wilson, 204 Jones Avenue, Anytown, Missouri 60000.
5. The annual percentage rate is 12 percent.
6. The finance charge is $280.
7. The amount financed is $2,000.
8. The total amount to be paid is $2,280.
9. The amount is to be paid in one payment, due one year from the current date or payable on demand.
10. There is no penalty for prepayment.
11. The annual percentage rate does not take into account the required deposit.
12. Assume the necessary copy of this document would be made on a copy machine.

ASSIGNMENT SHEET 4: Extension Agreement

Directions: Mr. Wilson (See Assignment Sheets 2 and 3) is unable to pay his note when due. Type the necessary information to complete the Extension Agreement (HO 2). Assume the necessary copy would be made on a copy machine.

1. The Extension Agreement is for Note #1250 for $2,000.
2. The unpaid balance is $2,280.
3. The location is Anytown, Missouri.
4. The balance is to be extended for one year from the current date (select a weekday).
5. Mr. Wilson is to be asked to repay the balance, plus interest of $280, plus a service charge of $20.
6. The interest rate is 12 percent.
7. The current interest of $280 is to be paid now. Therefore, Mr. Wilson will owe $2,300.

ASSIGNMENT SHEET 5: Composing a Welcome Letter

Directions: You are in charge of new accounts. Compose and type a letter welcoming people who have opened a new account in your bank (Anytown National Bank).

1. Use plain typing paper, but assume you would have a letterhead.

2. Use the letter style of your choice.

3. Make one carbon copy.

Information:

Mr. and Mrs. Edward Ward, 1643 South Orange Street, Anytown, Missouri 60000: Mr. and Mrs. Ward have recently moved from Kansas. They have two children, a daughter (Wendy) 13 and a son (Eric) 10. Mr. Ward is a teacher at Anytown Community College, and Mrs. Ward is a secretary in a local law firm. They have opened a joint checking account and a savings account. Also, they have opened small savings accounts for each of their children. They ordered checks which they should receive within a week.

Welcome these new depositors to your bank and to your community.

ASSIGNMENT SHEET 6: Composing an Insurance Form Letter

Directions: Compose a form letter to go with a printed statement you will be sending to all car insurance customers about a change in their insurance coverage.

1. Set up this letter as a form letter with two variables (policyholder's name and policy number).

2. Type a draft of the letter, leaving blanks where the variables would be inserted.

Facts:

You are enclosing an information sheet from the Safe Insurance Company explaining a change in insurance coverage. This is a change you are happy to make as you are sure it will give your policyholders more complete coverage. If they have any questions, they should call your office (419-3000) or make an appointment to discuss their coverage with Mrs. Baker, your district representative.

OPTION:

If you have word processing equipment or a typewriter with memory capabilities, set the letter up as a form letter and prepare three copies using the following data:

CUSTOMER	POLICY
Ms. Paula McAdams 3456 South Main Street Anytown, MO 60000	G-6003245
Mr. and Mrs. Howard Schaube Route 1, Box 34 Anytown, MO 60000	B-4806311
Mr. Brian Willard 4398 Cherry Avenue Anytown, MO 60000	B-3747792

ASSIGNMENT SHEET 7: Family Services Form

Directions: Use the form (HO 4 and HO 5) from the Division of Family Services to notify the following client of aid approval. Using the following data, complete the form by typing the necessary information.

1. Study the form; read both pages.
2. Using the following data, complete the form by typing the necessary information.

Facts:

1. Current date
2. Your county
3. County director--John Doe
4. Telephone - (816) 747-3000
5. Only Box 1 needs to be checked.
6. Boxes 2-5 may be left blank.

Mrs. Jane Smith's application was for aid for dependent children and is approved. Her monthly check will be $250, based on an income before taxes of $8,900 per year.

ASSIGNMENT SHEET 8: Food Stamp Form Message

Directions: Use the Food Stamp Form (HO 6) to notify clients about the action taken on their food stamp requests.

1. Complete the front and back of the form.
2. Make one copy.
3. Type the necessary data on this form for the two individuals listed below.

Facts:

1. Mrs. Mary Jones, 220 West Warren Street, Warrensburg, MO, 64093: She will receive food stamp benefits during the months of January through June. She will receive $50 in January, covering the month of January, and will receive $50 each month through June. Income counted in determining her benefit is $150 monthly from AFDC and $300 monthly from earnings. There are no allowable deductions.
2. Mr. Tom Wilson, Route 1, Warrensburg, MO 64093: Mr. Wilson has not furnished all necessary information. We need verification of his wages. If we have this within 10 days from the current date (be sure it's a weekday), he will not have to reapply.

ASSIGNMENT SHEET 9: Supplies Requisition

Directions: Use a Requisition Form (HO 7) for the Department of Social Services to request materials from the state office. Use the following information to complete the form.

1. Type the form.
2. Make 2 carbon copies.
3. Extend totals, but do not add.
4. Do not type any data on the bottom portions of the form.

NOTE: Some items may not be available, and the state office will charge the local office for the actual amount.

Facts:

1. Division--Family Services
2. Section--Johnson County
3. Address--708 N. College, P.O. Box 576, Warrensburg, MO 64093
4. Leave vendor information blank

Order the following:

6 boxes 021 paper clips @ .40 ea.
3 boxes 041 pens @ $1.89 ea.
2 reams white paper 120 @ $3.25 ea.
6 typewriter ribbons 241 @ .98 ea.
2 boxes file folders 124 @ $2.48 ea.

2 pads Form IM-32 - no charge
2 pads Form IM-112 - no charge

ASSIGNMENT SHEET 10: Typing a Legal Document From Longhand Copy

Directions: Type a document using the following information.

1. Legal cap (ruled legal paper) or using 1 1/2 inch by 1/2 inch side margins.
2. If you use 8 1/2" by 11" paper, begin the title on line 13.
3. Indent paragraphs 10 spaces.

POWER OF ATTORNEY

¶ KNOW ALL MEN BY THESE PRESENTS that I, Grant Andrews, of 804 N. Maguire, Warrensburg, Missouri, do hereby appoint Elaine Deer, of 200 N. Holden, Warrensburg, Missouri, my attorney, for me and in my name to deposit in all banks that I may have an account with all monies which shall come to her bank as such attorney and all bills of exchange, drafts, checks, promissory notes, and other securities for money payable or belonging to me, and for that purpose to sign my name and endorse the same for deposit or collection, and from time to time to withdraw any and all monies deposited with said banks, and for that purpose to draw checks in my name, and generally to do and perform all things necessary in or about the premises as fully and effectually in all respects as I could do if personally present.

IN WITNESS WHEREOF, I have ~~hete~~ hereunto set my hand and seal this — day of —, 19—. (Use current date)

____________________(Seal)

ASSIGNMENT SHEET 11: Transcribing Legal Correspondence

Directions: Your instructor will dictate two letters.

1. Study the terms listed below.
2. Type the following letters in modified block style with blocked paragraphs and mixed punctuation.
3. Use plain paper but assume a letterhead.
4. Make one carbon copy.
5. The signature should be Sam Johnson, Attorney-at-Law.

TERMS TO STUDY

Letter 1

retained
above-captioned
aforementioned
pursuant
liable
injuries
liability
complaint
damages
avert

Letter 2

retained
accident
adverse
vehicle
liability
documentation
uninsured
resolved

ASSIGNMENT SHEET 11: Transcribing Legal Correspondence

FOR INSTRUCTORS ONLY:

Use a dictating machine or give oral dictation for the following letters. You may wish to have students preview the terms listed below. The letters should be typed in modified-block style with blocked paragraphs and mixed punctuation. Students may use plain paper and assume a letterhead. They should make one carbon copy. The letters will be signed by Sam Johnson, Attorney-at-Law.

TERMS TO STUDY

Letter 1

retained
above-captioned
aforementioned
pursuant
liable
injuries
liability
complaint
damages
avert

Letter 2

retained
accident
adverse
vehicle
liability
documentation
uninsured
resolved

DICTATION LETTER 1

To Mr. David Means, 200 Clinkscales Road, Columbia, MO 65201, Dear Mr. Means, RE: My Client, Miss Wendy Keseman.

Please be advised that I have been retained by Wendy Keseman to represent her respective interest in the above-captioned matter.

You may recall that the aforementioned accident was caused by your Ford Mustang, Missouri license No. VIP-500, rear-ending my client's vehicle, while your Mustang was being used with permission by Adam Morgan. As the registered owner of said vehicle, pursuant to the Missouri Vehicle Code, you are liable for my client's extensive injuries.

We, therefore, request that you forward a copy of this letter to your automobile liability insurance company immediately so that they can handle the matter for you. If you were not insured on the date of this accident, please call me so that I may discuss this matter with you.

If we do not hear from you or from your insurance company within ten days of the date of this letter, we will have no alternative but to file and serve you with a Complaint for Personal Injuries and Damages. Of course, your immediate attention to this matter will avert said action.

Please keep in mind that your immediate response is important.

Sincerely,

DICTATION LETTER 2

To: Cover-All Insurance Company, 600 N. Holden, Warrensburg, MO 64093,
Gentlemen
Re: Your insured, Wendy Keseman

This letter is to advise you that I have been retained by your insured, Wendy Keseman, to represent her interests in a personal injury accident.

Preliminary information indicates that neither the adverse driver, Adam Morgan, nor the registered owner of said vehicle, David Means, carried any liability insurance at the time of the accident.

For your file documentation, you may wish to obtain a copy of the Traffic Collision Report prepared by the Columbia Police Department. As indicated, liability is clearly adverse to the uninsured party. I understand that the property damage to my client's vehicle has been resolved by your company to her satisfaction.

If you have any questions about this matter, please do not hesitate to call me. Your assistance in this matter would be sincerely appreciated.

Sincerely,

ASSIGNMENT SHEET 12: Completing a Legal Form

Directions: Complete a form for Letters Testamentary (HO 8).

Facts:

This document is to be prepared for the estate of Carl Rowen. He resided (lived) in Orange County, Missouri, and died October 12, 19___. The Personal Representative to be appointed is Sarah Mills. The document is to be signed on the current date.

ASSIGNMENT SHEET 13: The Notary Seal

Directions: Locate at least one notary public in your community. Secretaries who may be notaries are employed in law offices, banks, and insurance companies. Make arrangements to visit one of these notaries. Have the notary show how the seal and stamp are applied and the journal in which the notarizations are recorded. Ask the notary about problems encountered in performing the notary function. Complete the following form and turn it in to your instructor.

OPTION: Your instructor may wish to invite a notary to the class and to have that person bring along the seal and stamp for a demonstration.

Name of Notary ______________________________

Date Visited ______________________________

Type of Employment ______________________________

Duties of Notary Public ______________________________

____

____

Potential problems encountered in notary work ______________________________

____

____

____

____

____

ASSIGNMENT SHEET 14: Greeting Patients and Answering the Telephone

Directions: Prepare and type a response to each of the following case situations. Indicate how you would handle each case and why.

CASE 1: Edna Schaube arrives at 1:30 p.m. for an appointment with Dr. Garcia. Her appointment is for 2:30 p.m. She is sure her appointment is for 1:30 p.m.

CASE 2: One of Dr. Garcia's patients asks you to have dinner Friday night.

CASE 3: A patient calls and wants to talk to Dr. Garcia, but the doctor is with another patient.

CASE 4: A patient waiting to see Dr. Garcia asks your opinion about how to treat her illness.

CASE 5: A patient in a wheelchair (with both legs amputated) has difficulty entering your waiting area and is stuck in the door.

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ASSIGNMENT SHEET 15: Transcribing Medical Correspondence

Directions: Your instructor will dictate one letter for transcription. Type this letter in modified-block style with indented paragraphs. The letter will be signed by Juan Garcia, M.D. Use plain paper; make one carbon copy.

TERMS FOR STUDY

intermittent
laryngoscopy
nodules
anterior
posterior
benign
bilateral
lesions
excision
therapy
vocal cords

ASSIGNMENT SHEET 15: Transcribing Medical Correspondence

FOR INSTRUCTORS ONLY: Provide oral or machine dictation for the following letter which should be typed in modified-block style with indented paragraphs. The letter will be signed by Juan Garcia, M.D. Use plain paper; make one carbon copy.

TERMS FOR STUDY

intermittent
laryngoscopy
nodules
anterior
posterior
benign
bilateral
lesions
excision
therapy
vocal cords

DICTATION:

To: Dr. Albert Moran, 171 Highland Avenue, Anytown, MO 60000. Dear Dr. Moran: Thank you for referring Stephanie Clemons for evaluation of intermittent hoarseness.

This patient has a history consistent with vocal abuse. Direct laryngoscopy reveals the presence of bilateral lesions that are typical of vocal cord nodules. The nodules are seen at the junction between the anterior one-third and posterior two-thirds of both the left and right true vocal cords. The lesions are completely benign and may resolve if the child has satisfactory speech therapy and training.

I do want to see Stephanie for reevaluation at the end of five months. If speech therapy provides satisfactory improvement, surgical excision of the lesions may not be necessary. Cordially yours, Juan Garcia, M.D.

ASSIGNMENT SHEET 16: Preparing a Universal Claim Form

While individual insurance companies have their own insurance claim forms, the American Medical Association and the Health Insurance Council approved a universal form (HO 9) in 1975 which is designed to standardize insurance claims. This form is called a Universal or Uniform Claim Form. This form must be accepted by all insurance carriers, except for plans that are sponsored by the government such as Medicare.

Directions: Complete a Universal Claim Form for the following case.

FACTS:

Dr. Garcia uses the Universal Claim Form. Prepare one of these forms for Harvey Reeves, who has an individual policy with Save-More Insurance, 2250 East Commerce, Chicago, IL 60650. His ID number is 400-58-6685. Mr. Reeves lives at 1108 Vest, Anytown, MO 60000. His date of birth is June 10, 1943. His condition was not employment related and was not an auto accident.

I. Complete the Patient & Insured Information section of the form. At the top of the form, check (X) Other and type in the name and address of the insurance carrier for Mr. Reeves. The following lines will not be filled in: 8, 9, 12, 13.

II. Use the following information to complete the Physician or Supplier Information section:

Line	
14	Skip
15	11/15 (current year)
16	No
17-18	No disability
19	Skip
20	Skip
21	Office
22	Yes
23	Rheumatic carditis with a. mitral stenosis b. mitral insufficiency c. probably subacute bacterial endocarditis
24	(A) 11/15/--, (B) 3, (C) 90040, Office visit, (D) 1, (E) $45
25	Current date
26	No
27	$45
28	0 paid
29	$45
30	394-48-5696
31	Dr. Juan Garcia, Anytown Medical Building, 200 Hospital Hill, Anytown, MO 60000, ID No. T-33567
32	Skip
33	Skip

ASSIGNMENT SHEET 17: Typing A Case History From Longhand Copy

Directions: Study the format for typing a case history. Using this format, type the following case history.

1. Begin on line 10.

2. Use the current year.

3. Block data under Physical Examination.

Sarah L. Peters

Chief Complaint

Patient admitted to the Southwest Medical Center on 6/21/--, at 11:45 a.m, with numerous injuries.

Present Illness

Patient was climbing the stairs to her front home entrance when her foot slipped off the last step, and she fell to the bottom of the stairs.

Past History

Patient has been in reasonably good health considering her age of 82 years.

Family History

Not relevant.

Physical Examination

General:	Female, 82 years of age.
Head c̄ Neck:	Negative. Thyroid gland normal. No evidence of cervical lymphadenitis
Eyes:	Pupils equal and regular, react to light and accommodations.

ENT: Negative. Patient wears complete set of dentures.

Chest: Tender to palpation, both sides.

Lungs: Clear, resonant — minimal basilar rales.

Heart: Some degree of arrhythmia. Blood pressure 130/70.

Abdomen: Liver and spleen not palpable

Pelvic: NA

Rectal: Normal

Extremities: Lower extremities normal. X-ray of upper extremities reveals fracture of right digital radius as well as a fracture of the right clavicle. There are several abrasions and contusions.

Impression

Multiple trauma including comminuted fracture of the right/distal radius, fracture of the right clavicle, and possible rib fracture.

Juan Garcia, M.D.

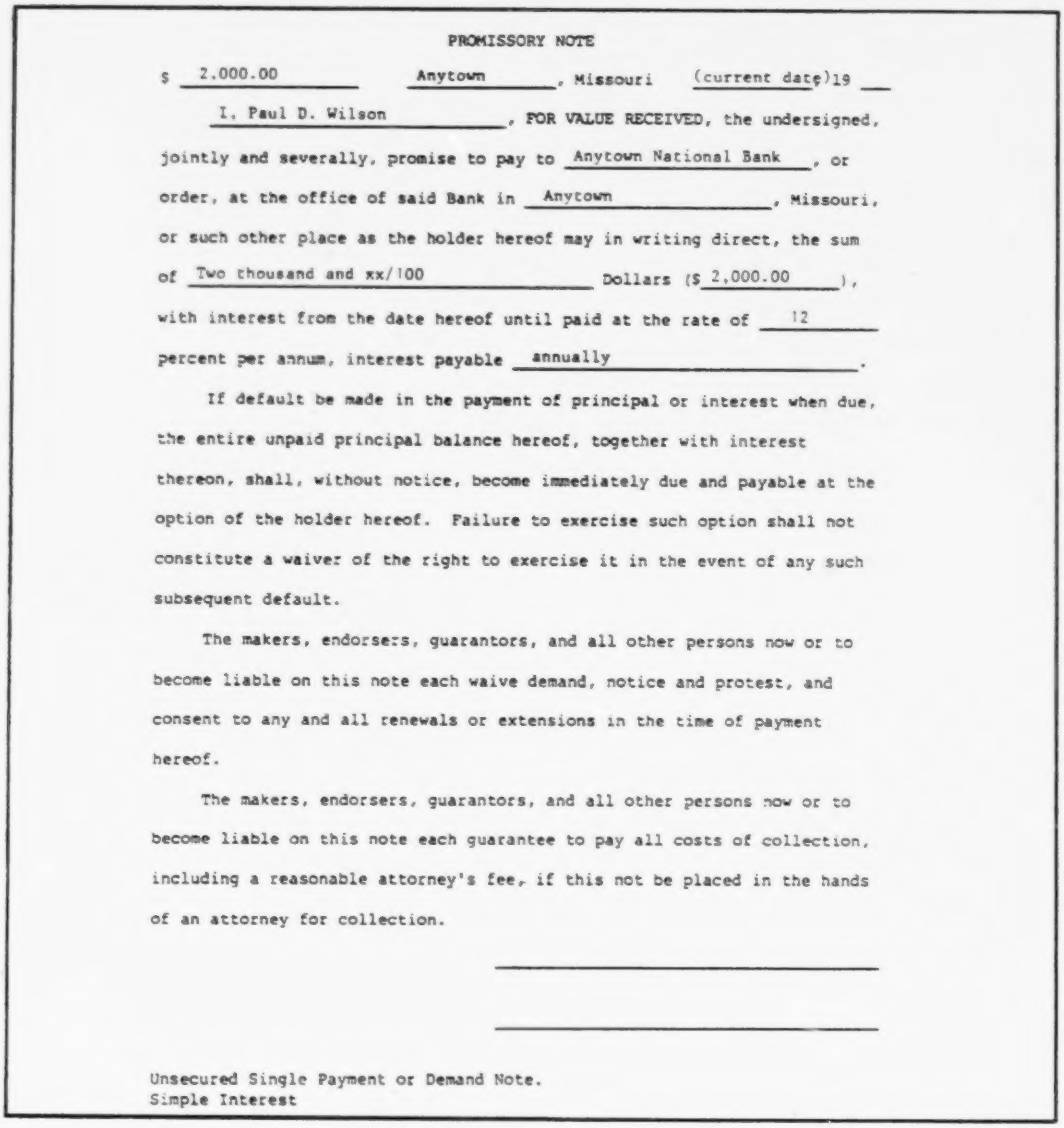
Rg. In.: 6/03/--

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet 1:

Evaluation should be based on the following criteria: 1) a complete list of offices, 2) an oral or written report that gives evidence of planning and provides specific information about the secretarial duties, skills, and likes and dislikes of the job. If the report is typed, it should be in a report format, neatly typed, with all errors corrected.

Assignment Sheet 2:



PROMISSORY NOTE

$ 2,000.00 Anytown, Missouri (current date)19 ___

I, Paul D. Wilson, FOR VALUE RECEIVED, the undersigned, jointly and severally, promise to pay to Anytown National Bank, or order, at the office of said Bank in Anytown, Missouri, or such other place as the holder hereof may in writing direct, the sum of Two thousand and xx/100 Dollars ($ 2,000.00), with interest from the date hereof until paid at the rate of 12 percent per annum, interest payable annually.

If default be made in the payment of principal or interest when due, the entire unpaid principal balance hereof, together with interest thereon, shall, without notice, become immediately due and payable at the option of the holder hereof. Failure to exercise such option shall not constitute a waiver of the right to exercise it in the event of any such subsequent default.

The makers, endorsers, guarantors, and all other persons now or to become liable on this note each waive demand, notice and protest, and consent to any and all renewals or extensions in the time of payment hereof.

The makers, endorsers, guarantors, and all other persons now or to become liable on this note each guarantee to pay all costs of collection, including a reasonable attorney's fee, if this not be placed in the hands of an attorney for collection.

Unsecured Single Payment or Demand Note.
Simple Interest

Assignment Sheet 3:

LOAN DISCLOSURE STATEMENT

Anytown National Bank
Creditor

Date (Current)

Description of Loan

Paul D. Wilson
Borrower(s)

204 Jones Avenue
Address

Anytown, Missouri 60000

ANNUAL PERCENTAGE RATE	FINANCE CHARGE	Amount Financed	Total of Payments
The cost of your credit as a yearly rate.	The dollar amount the credit will cost you.	The amount of credit provided to you or on your behalf.	The amount you will have paid when you have made all scheduled payments.
12%	$ 280.00	$ 2,000.00	$ 2,280.00

You have the right to receive at this time an itemization of the Amount Financed.

____ I want an itemization. __x__ I do not want an itemization.

Your payment schedule will be:

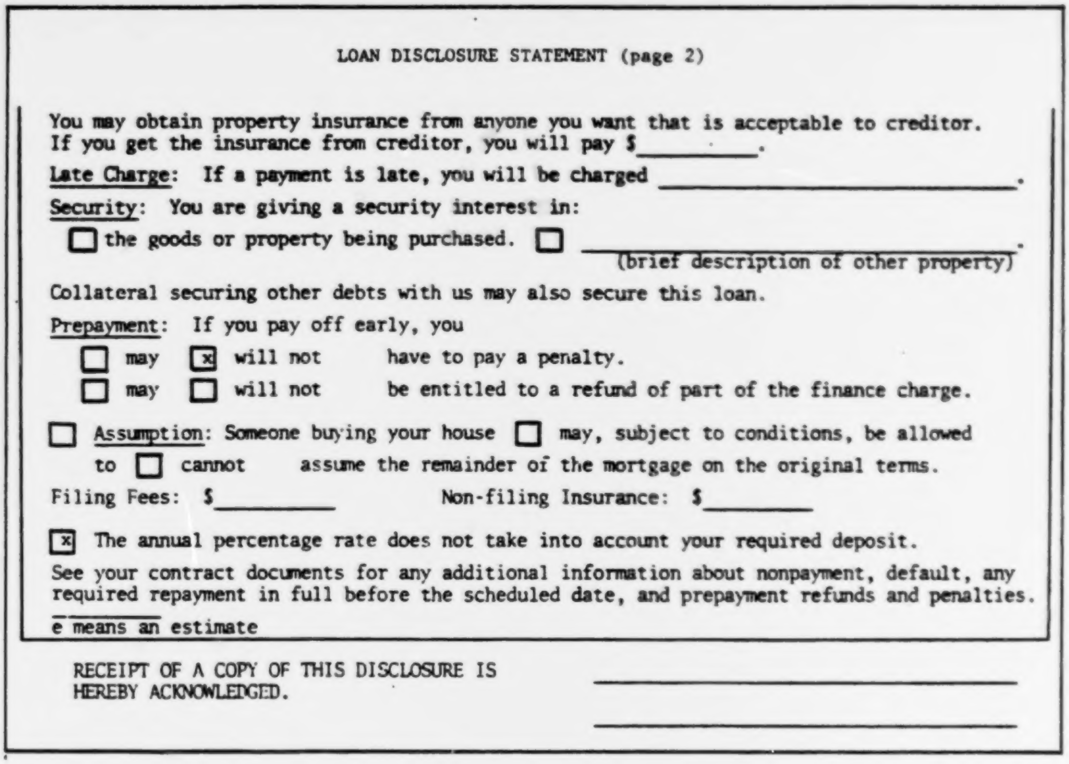
Number of payments	Amount of Payments	When Payments Are Due
1	$2,280.00	(one yr. from current date) or Payable on d[illegible]d

This obligation ☒ is payable on demand. All disclosures are based on an assumed maturity of one year.

☐ has a demand feature.

Insurance: Credit life insurance and credit disability insurance are not required to obtain credit, and will not be provided unless you sign and agree to pay the additional cost.

Type	Premium	Signature
Credit Life		I want credit life insurance. ____________ Signature
Credit Disability		I want credit disability insurance. ____________ Signature
Credit Life and Disability		I want credit life and disability insurance. ____________ Signature



LOAN DISCLOSURE STATEMENT (page 2)

You may obtain property insurance from anyone you want that is acceptable to creditor. If you get the insurance from creditor, you will pay $__________.

Late Charge: If a payment is late, you will be charged ______________________________.

Security: You are giving a security interest in:

☐ the goods or property being purchased. ☐ ______________________________.
(brief description of other property)

Collateral securing other debts with us may also secure this loan.

Prepayment: If you pay off early, you

☐ may ☒ will not have to pay a penalty.
☐ may ☐ will not be entitled to a refund of part of the finance charge.

☐ **Assumption**: Someone buying your house ☐ may, subject to conditions, be allowed to ☐ cannot assume the remainder of the mortgage on the original terms.

Filing Fees: $__________ Non-filing Insurance: $__________

☒ The annual percentage rate does not take into account your required deposit.

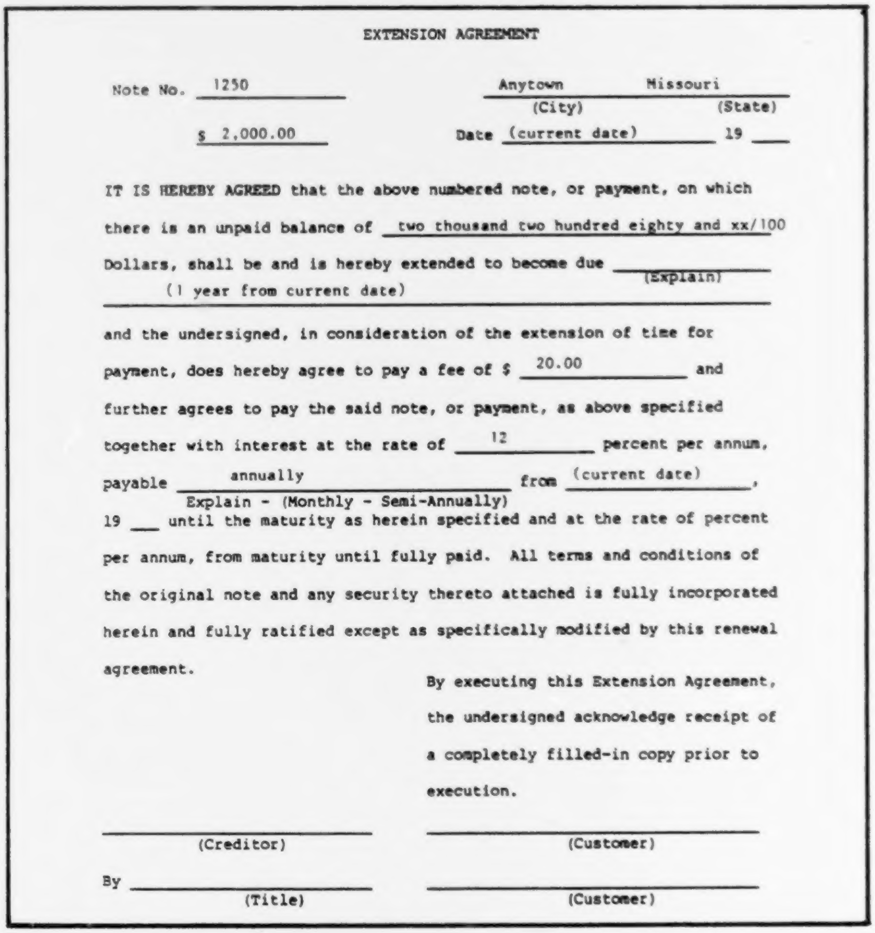
See your contract documents for any additional information about nonpayment, default, any required repayment in full before the scheduled date, and prepayment refunds and penalties.

e means an estimate

RECEIPT OF A COPY OF THIS DISCLOSURE IS HEREBY ACKNOWLEDGED. ______________________________

____

Assignment Sheet 4:



EXTENSION AGREEMENT

Note No. 1250 Anytown (City) Missouri (State)

$ 2,000.00 Date (current date) 19 ___

IT IS HEREBY AGREED that the above numbered note, or payment, on which there is an unpaid balance of two thousand two hundred eighty and xx/100 Dollars, shall be and is hereby extended to become due (Explain) (1 year from current date)

and the undersigned, in consideration of the extension of time for payment, does hereby agree to pay a fee of $ 20.00 and further agrees to pay the said note, or payment, as above specified together with interest at the rate of 12 percent per annum, payable annually Explain - (Monthly - Semi-Annually) from (current date), 19 ___ until the maturity as herein specified and at the rate of percent per annum, from maturity until fully paid. All terms and conditions of the original note and any security thereto attached is fully incorporated herein and fully ratified except as specifically modified by this renewal agreement.

By executing this Extension Agreement, the undersigned acknowledge receipt of a completely filled-in copy prior to execution.

______________________________ (Creditor)
______________________________ (Customer)

By ______________________________ (Title)
______________________________ (Customer)

Assignment Sheet 5:

Student should apply principles covered in Unit II (written communications) to this assignment. The letter should be typed neatly, and data should be correct. Corrections should not be noticeable.

The letter should welcome the family, mention the new accounts, and tell when the ordered checks will arrive. More creative students may also encourage the Wards to use other bank services.

Assignment Sheet 6:

Students should apply principles covered in Unit II to this assignment. The letter should be set up in an attractive format with space provided for variables (such as policyholder's name and policy number).

The letter should have a pleasant and helpful tone. Since an information sheet is to be enclosed, it should be mentioned. Policyholders should be encouraged to call if they have questions.

Assignment Sheet 7:

Although the second page of the form was provided, the students should determine that no information will be entered on that page.

FAMILY SERVICES FORM

STATE OF MISSOURI
DEPARTMENT OF SOCIAL SERVICES
DIVISION OF FAMILY SERVICES

IM 32
(Rev 2/83)

COUNTY OFFICE: (your county office)

MISSOURI

COUNTY DIRECTOR: John Doe

PHONE: (816) 747-3000

DATE

(COUNTY OFFICE USE ONLY)
(This is NOT a Medicaid No. in this Section—See Back Side For Medicaid No.)

CASE NAME: ____
CASE NUMBER: ____
CASE NUMBER: ____

Dear

This is to advise you that your application for aid for dependent children has been approved. On the basis of our investigation of your income and expenses, which you helped provide, we find that:

1. ☒ your monthly check will be $ 250.00. This is based on income before taxes of $ 8,900.00 per year.
2. ☐ you have $ ____ of your own income which could be applied toward your medical expenses. Since your medical expenses have exceeded this amount, you now qualify for medical assistance coverage through ____.
   If you wish medical coverage beyond this date, you must reapply after ____ *(Date)* and if possible before ____ *(Date)* 19 ___.
3. ☐ you have been approved for Title XIX (Medical) coverage only (no cash grant).
4. ☐ the assistance grant (from box 1) is determined without considering child support or alimony as direct income to the household. Therefore, as of ____ *(Date)* it will be required that all child support and alimony received by you must be sent to the Support Enforcement Agency located at ____.
5. ☐ other: ____

All assistance checks and/or medicaid card, are mailed directly to you from the office of the Division of Family Services in Jefferson City. You may expect to receive your first check approximately two weeks from the date of this letter.

The Federal Law requires that family planning services be made available to persons receiving Aid to Families with Dependent Children. The services which are available can be explained at the County Office. These family planning services are entirely voluntary, and no one has to accept the services unless he or she desires them.

We are enclosing a leaflet which contains important information about your assistance. Please read it carefully and keep it for future reference.

To be sure that your check, and/or medicaid card, will be delivered on time each month it is very important that you inform us immediately when you move or change your address.

IF YOUR SITUATION CHANGES IT IS YOUR RESPONSIBILITY UNDER THE LAW TO REPORT THESE CHANGES AT ONCE TO THE LOCAL COUNTY OFFICE. THE LAW PROVIDES PENALTIES FOR ANY PERSONS WHO RECEIVE BENEFITS TO WHICH THEY ARE NOT ENTITLED THROUGH MISREPRESENTING THE FACTS OR NOT REPORTING FULL INFORMATION ABOUT THEIR SITUATION.

Enclosure: Information
Leaflet(s) No. ____

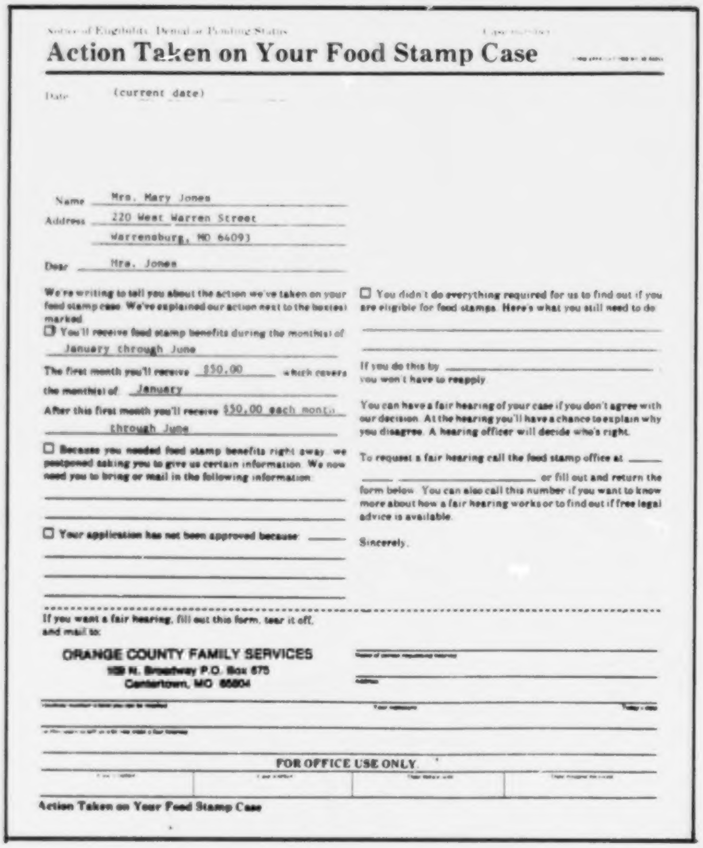
Sincerely,

CASEWORKER

IMPORTANT: THE BACK OF THIS LETTER IS VERIFICATION OF YOUR MEDICAL COVERAGE.

RETAIN CURRENT FORM

Assignment Sheet 8:



Notice of Eligibility, Denial or Pending Status

Case number

Action Taken on Your Food Stamp Case

Date (current date)

Name Mrs. Mary Jones
Address 220 West Warren Street
Warrensburg, MO 64093

Dear Mrs. Jones

We're writing to tell you about the action we've taken on your food stamp case. We've explained our action next to the box(es) marked.

☑ You'll receive food stamp benefits during the month(s) of January through June

The first month you'll receive $50.00 which covers the month(s) of January

After this first month you'll receive $50.00 each month through June

☐ Because you needed food stamp benefits right away, we postponed asking you to give us certain information. We now need you to bring or mail in the following information:

☐ Your application has not been approved because:

☐ You didn't do everything required for us to find out if you are eligible for food stamps. Here's what you still need to do:

If you do this by ______, you won't have to reapply.

You can have a fair hearing of your case if you don't agree with our decision. At the hearing you'll have a chance to explain why you disagree. A hearing officer will decide who's right.

To request a fair hearing call the food stamp office at ______ ______ or fill out and return the form below. You can also call this number if you want to know more about how a fair hearing works or to find out if free legal advice is available.

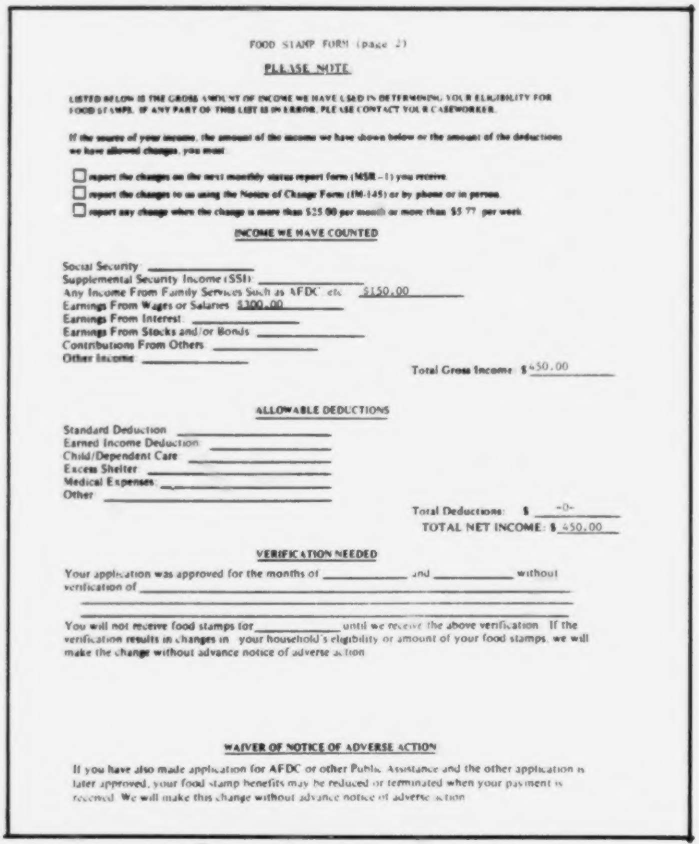
Sincerely,

If you want a fair hearing, fill out this form, tear it off, and mail to:

ORANGE COUNTY FAMILY SERVICES
109 N. Broadway P.O. Box 675
Centertown, MO 65804

FOR OFFICE USE ONLY

Action Taken on Your Food Stamp Case



FOOD STAMP FORM (page 2)

PLEASE NOTE

LISTED BELOW IS THE GROSS AMOUNT OF INCOME WE HAVE USED IN DETERMINING YOUR ELIGIBILITY FOR FOOD STAMPS. IF ANY PART OF THIS LIST IS IN ERROR, PLEASE CONTACT YOUR CASEWORKER.

If the source of your income, the amount of the income we have shown below or the amount of the deductions we have allowed changes, you must:

☐ report the changes on the next monthly status report form (MSR-1) you receive.
☐ report the changes to us using the Notice of Change Form (IM-145) or by phone or in person.
☐ report any change where the change is more than $25.00 per month or more than $5.77 per week.

INCOME WE HAVE COUNTED

Social Security: ______
Supplemental Security Income (SSI): ______
Any Income From Family Services Such as AFDC, etc. $150.00
Earnings From Wages or Salaries $300.00
Earnings From Interest: ______
Earnings From Stocks and/or Bonds ______
Contributions From Others ______
Other Income: ______

Total Gross Income: $450.00

ALLOWABLE DEDUCTIONS

Standard Deduction ______
Earned Income Deduction: ______
Child/Dependent Care: ______
Excess Shelter: ______
Medical Expenses: ______
Other ______

Total Deductions: $ -0-
TOTAL NET INCOME: $ 450.00

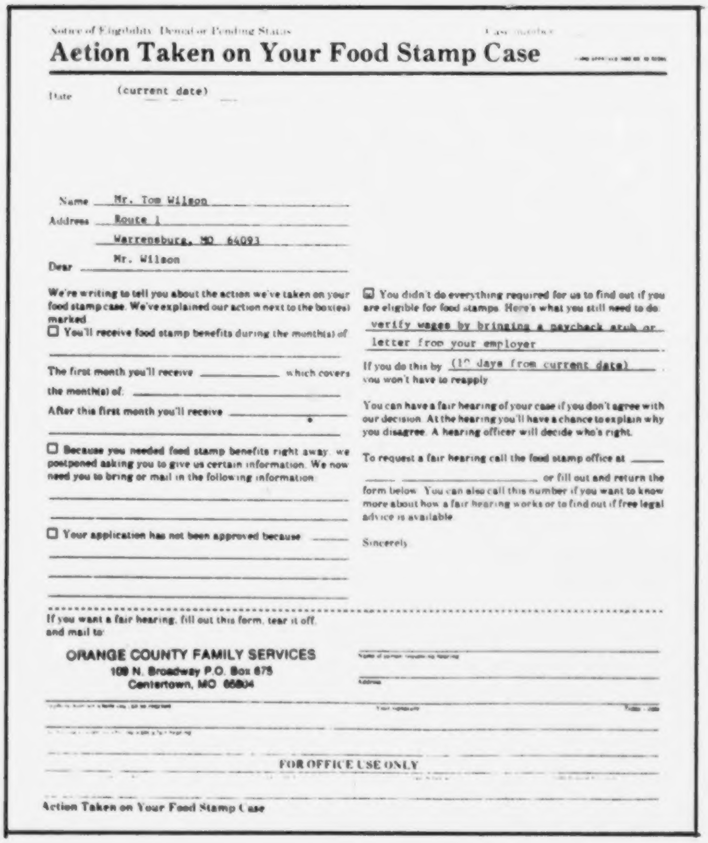
VERIFICATION NEEDED

Your application was approved for the months of ______ and ______ without verification of ______

You will not receive food stamps for ______ until we receive the above verification. If the verification results in changes in your household's eligibility or amount of your food stamps, we will make the change without advance notice of adverse action.

WAIVER OF NOTICE OF ADVERSE ACTION

If you have also made application for AFDC or other Public Assistance and the other application is later approved, your food stamp benefits may be reduced or terminated when your payment is received. We will make this change without advance notice of adverse action.



Notice of Eligibility, Denial or Pending Status

Case number

Aetion Taken on Your Food Stamp Case

Date (current date)

Name Mr. Tom Wilson

Address Route 1

Warrensburg, MO 64093

Dear Mr. Wilson

We're writing to tell you about the action we've taken on your food stamp case. We've explained our action next to the box(es) marked

☐ You'll receive food stamp benefits during the month(s) of

The first month you'll receive ______ which covers the month(s) of ______

After this first month you'll receive ______

☐ Because you needed food stamp benefits right away, we postponed asking you to give us certain information. We now need you to bring or mail in the following information

☐ Your application has not been approved because ______

☒ You didn't do everything required for us to find out if you are eligible for food stamps. Here's what you still need to do:

verify wages by bringing a paycheck stub or letter from your employer

If you do this by (10 days from current date) you won't have to reapply

You can have a fair hearing of your case if you don't agree with our decision. At the hearing you'll have a chance to explain why you disagree. A hearing officer will decide who's right.

To request a fair hearing call the food stamp office at ______ or fill out and return the form below. You can also call this number if you want to know more about how a fair hearing works or to find out if free legal advice is available

Sincerely

If you want a fair hearing, fill out this form, tear it off, and mail to:

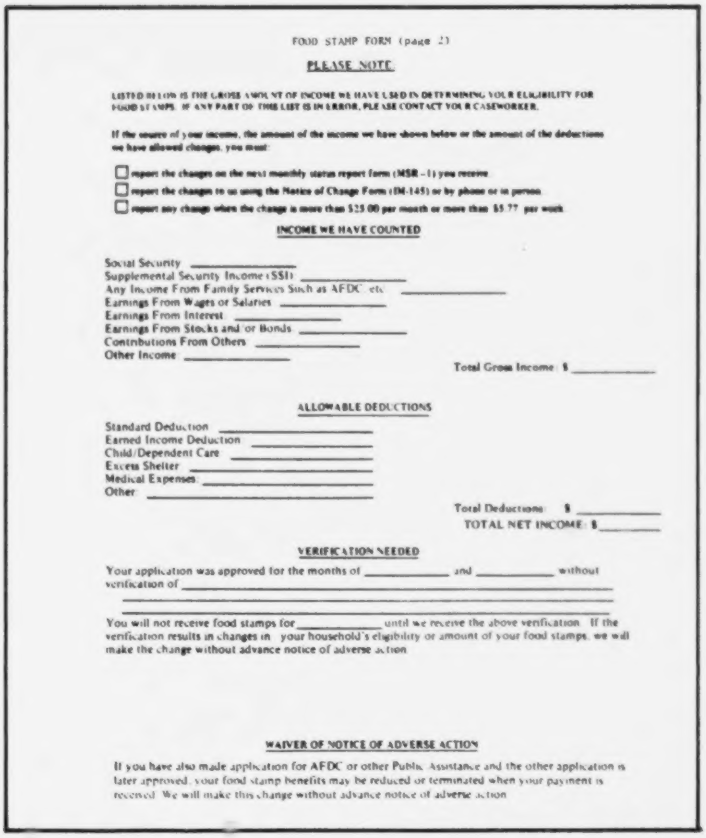
ORANGE COUNTY FAMILY SERVICES
109 N. Broadway P.O. Box 675
Centertown, MO 65804

Address

Your signature

FOR OFFICE USE ONLY

Action Taken on Your Food Stamp Case



FOOD STAMP FORM (page 2)

PLEASE NOTE

LISTED BELOW IS THE GROSS AMOUNT OF INCOME WE HAVE USED IN DETERMINING YOUR ELIGIBILITY FOR FOOD STAMPS. IF ANY PART OF THIS LIST IS IN ERROR, PLEASE CONTACT YOUR CASEWORKER.

If the source of your income, the amount of the income we have shown below or the amount of the deductions we have allowed changes, you must:

☐ report the changes on the next monthly status report form (MSR - 1) you receive
☐ report the changes to us using the Notice of Change Form (IM-145) or by phone or in person
☐ report any change when the change is more than $25.00 per month or more than $5.77 per week

INCOME WE HAVE COUNTED

Social Security ______
Supplemental Security Income (SSI) ______
Any Income From Family Services Such as AFDC, etc. ______
Earnings From Wages or Salaries ______
Earnings From Interest ______
Earnings From Stocks and/or Bonds ______
Contributions From Others ______
Other Income ______

Total Gross Income: $ ______

ALLOWABLE DEDUCTIONS

Standard Deduction ______
Earned Income Deduction ______
Child/Dependent Care ______
Excess Shelter ______
Medical Expenses ______
Other ______

Total Deductions: $ ______
TOTAL NET INCOME: $ ______

VERIFICATION NEEDED

Your application was approved for the months of ______ and ______ without verification of ______

You will not receive food stamps for ______ until we receive the above verification. If the verification results in changes in your household's eligibility or amount of your food stamps, we will make the change without advance notice of adverse action

WAIVER OF NOTICE OF ADVERSE ACTION

If you have also made application for AFDC or other Public Assistance and the other application is later approved, your food stamp benefits may be reduced or terminated when your payment is received. We will make this change without advance notice of adverse action

Assignment Sheet 9:

Department of Social Services

REQUISITION FORM

DIVISION Family Services

SECTION Johnson County
Institution, County, Region, District, Program, Bureau

DELIVERY ADDRESS 708 N. College, P.O. Box 576, Warrensburg, MO 64093
Number and Street, P.O. Box, City, Zip

EXPENDITURE CHARGED TO Johnson County Family Services
Agency, Cost Center, Object, Project/Grant

VENDOR INFO. ____________________
Vendor, Vendor Address, Vendor Number, Contract Number

____

Date Rec'd. ____________
Buyer Date ____________
Group A ☐ Group B ☐
SAM No. ____________
Date Proc'd ____________
Est. Delivery ____________

PURCHASING USE ONLY

FY ____________

NEW ☐
USED ☐
check one box only

Description	Item No.	Quantity Ordered	Unit	Unit Price	Amount	Commen
paper clips	021	6	boxes	.40	2.40	
pens	041	3	boxes	1.89	5.67	
white paper	120	2	reams	3.25	6.50	
typewriter ribbons	241	6		.98	5.88	
file folders	124	2	boxes	2.48	4.96	
Form IM-32		2	pads		N/C	
Form IM112		2	pads		N/C	

ACCOUNTING USE ONLY

INTERFACE CODE ____________________ ____________________

ACCT. NOs. ____________________ ____________________

____________________ ____________________

REQUESTED BY ____________________ APPROVED BY ____________________
Please PRINT or TYPE

TITLE ____________________ TITLE ____________________
Phone No.

DATE ____________________ DATE ____________________

DOF 1 - REV. 3/83 WHITE - Finance YELLOW - Requestor Returned PINK - Requestor

Assignment Sheet 10:

POWER OF ATTORNEY

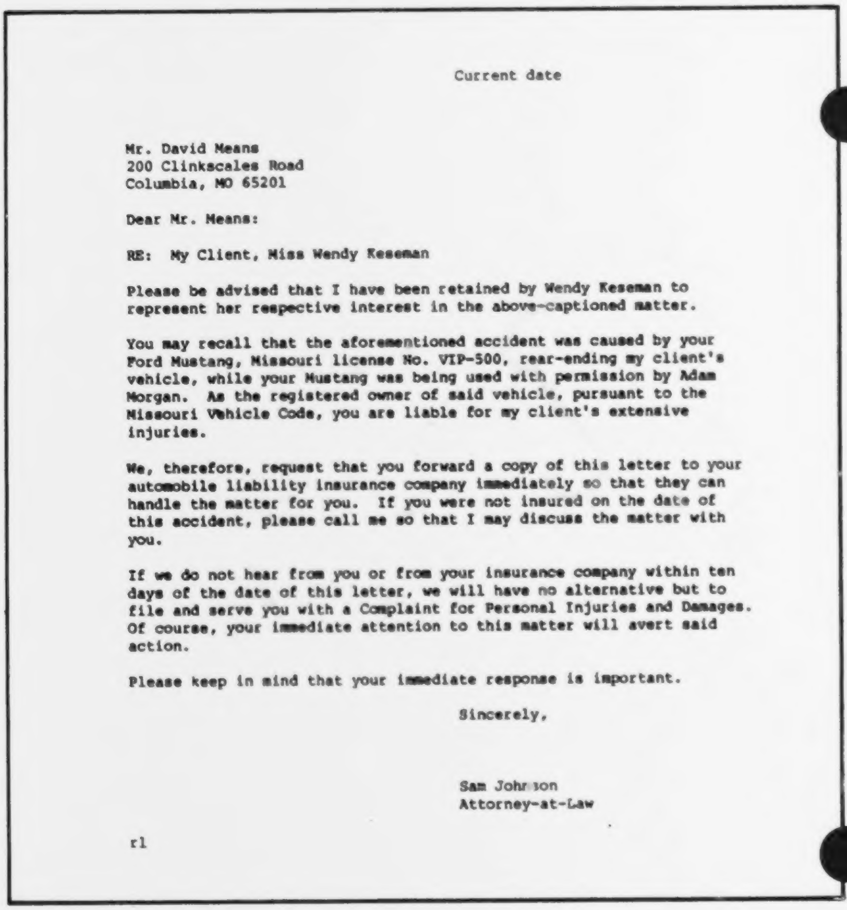
KNOW ALL MEN BY THESE PRESENTS that I, Grant Andrews, of 804 N. Maguire, Warrensburg, Missouri, do hereby appoint Elaine Deer, of 200 N. Holden, Warrensburg, Missouri, my attorney, for me and in my name to deposit in all banks that I may have an account with all monies which shall come to her bank as such attorney and all bills of exchange, drafts, checks, promissory notes, and other securities for money payable or belonging to me, and for that purpose to sign my name and endorse the same for deposit or collection, and from time to time to withdraw any and all monies deposited with said banks, and for that purpose to draw checks in my name, and generally to do and perform all things necessary in or about the premises as fully and effectually in all respects as I could do if personally present.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this

______________ of ______________, 19--. (current date)

____ (Seal)

Assignment Sheet 11:



Current date

Mr. David Means
200 Clinkscales Road
Columbia, MO 65201

Dear Mr. Means:

RE: My Client, Miss Wendy Keseman

Please be advised that I have been retained by Wendy Keseman to represent her respective interest in the above-captioned matter.

You may recall that the aforementioned accident was caused by your Ford Mustang, Missouri license No. VIP-500, rear-ending my client's vehicle, while your Mustang was being used with permission by Adam Morgan. As the registered owner of said vehicle, pursuant to the Missouri Vehicle Code, you are liable for my client's extensive injuries.

We, therefore, request that you forward a copy of this letter to your automobile liability insurance company immediately so that they can handle the matter for you. If you were not insured on the date of this accident, please call me so that I may discuss the matter with you.

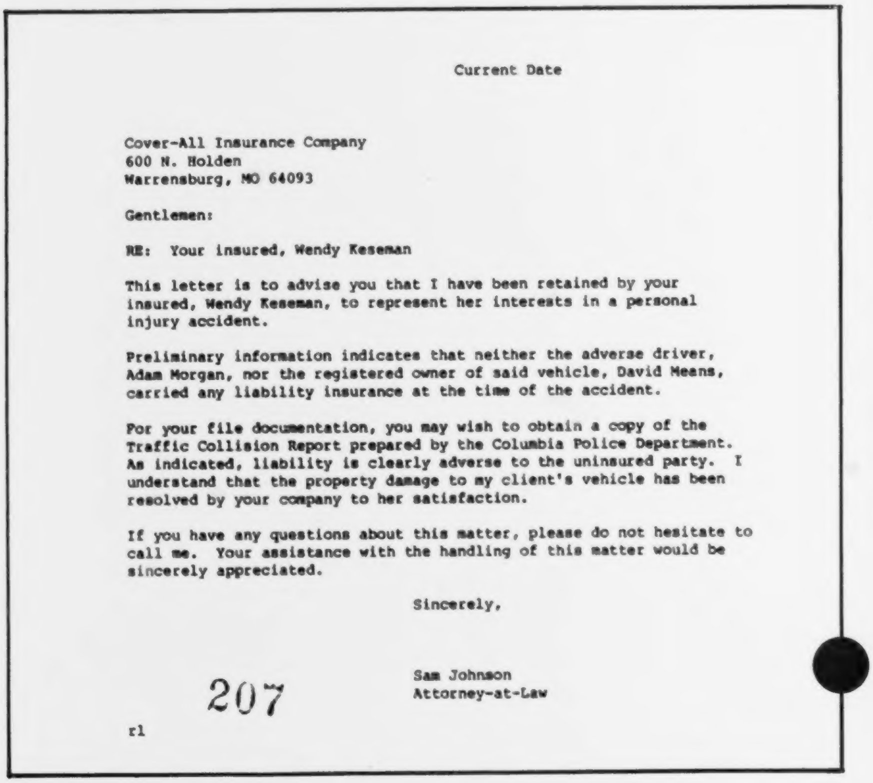
If we do not hear from you or from your insurance company within ten days of the date of this letter, we will have no alternative but to file and serve you with a Complaint for Personal Injuries and Damages. Of course, your immediate attention to this matter will avert said action.

Please keep in mind that your immediate response is important.

Sincerely,

Sam Johnson
Attorney-at-Law

rl



Current Date

Cover-All Insurance Company
600 N. Holden
Warrensburg, MO 64093

Gentlemen:

RE: Your insured, Wendy Keseman

This letter is to advise you that I have been retained by your insured, Wendy Keseman, to represent her interests in a personal injury accident.

Preliminary information indicates that neither the adverse driver, Adam Morgan, nor the registered owner of said vehicle, David Means, carried any liability insurance at the time of the accident.

For your file documentation, you may wish to obtain a copy of the Traffic Collision Report prepared by the Columbia Police Department. As indicated, liability is clearly adverse to the uninsured party. I understand that the property damage to my client's vehicle has been resolved by your company to her satisfaction.

If you have any questions about this matter, please do not hesitate to call me. Your assistance with the handling of this matter would be sincerely appreciated.

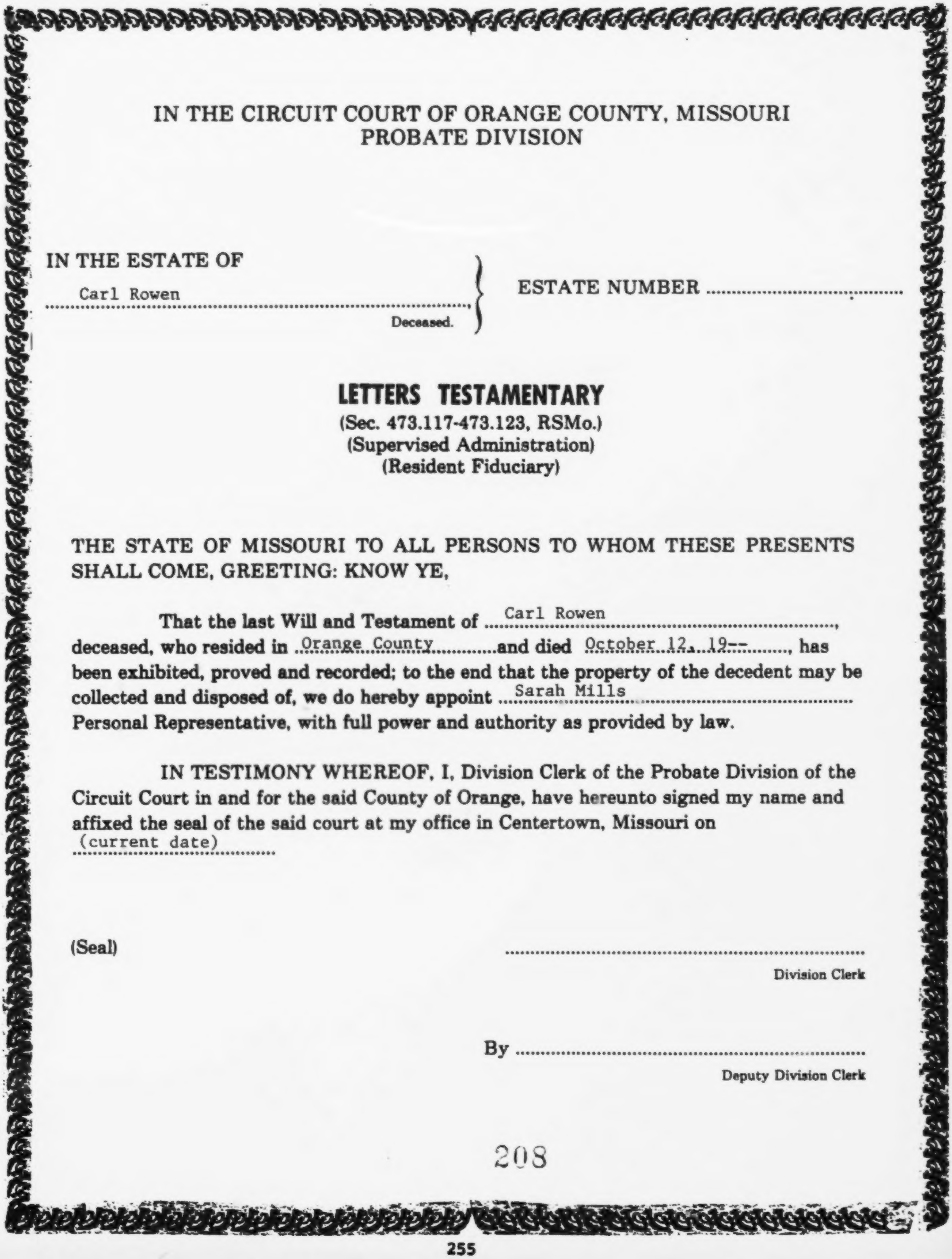
Sincerely,

207

Sam Johnson
Attorney-at-Law

rl

Assignment Sheet 12:



IN THE CIRCUIT COURT OF ORANGE COUNTY, MISSOURI
PROBATE DIVISION

IN THE ESTATE OF

Carl Rowen
Deceased.

ESTATE NUMBER ....

LETTERS TESTAMENTARY

(Sec. 473.117-473.123, RSMo.)
(Supervised Administration)
(Resident Fiduciary)

THE STATE OF MISSOURI TO ALL PERSONS TO WHOM THESE PRESENTS SHALL COME, GREETING: KNOW YE,

That the last Will and Testament of Carl Rowen, deceased, who resided in Orange County and died October 12, 19--, has been exhibited, proved and recorded; to the end that the property of the decedent may be collected and disposed of, we do hereby appoint Sarah Mills Personal Representative, with full power and authority as provided by law.

IN TESTIMONY WHEREOF, I, Division Clerk of the Probate Division of the Circuit Court in and for the said County of Orange, have hereunto signed my name and affixed the seal of the said court at my office in Centertown, Missouri on
(current date)

(Seal)

....
Division Clerk

By ....
Deputy Division Clerk

Assignment Sheet 13:

Encourage students to share their experiences from interviewing notaries in their community.

Assignment Sheet 14:

CASE 1: The secretary should explain tactfully that the appointment is for 2:30. Perhaps the patient still has her appointment card? Tell the patient that Dr. Garcia will see her as soon as possible.

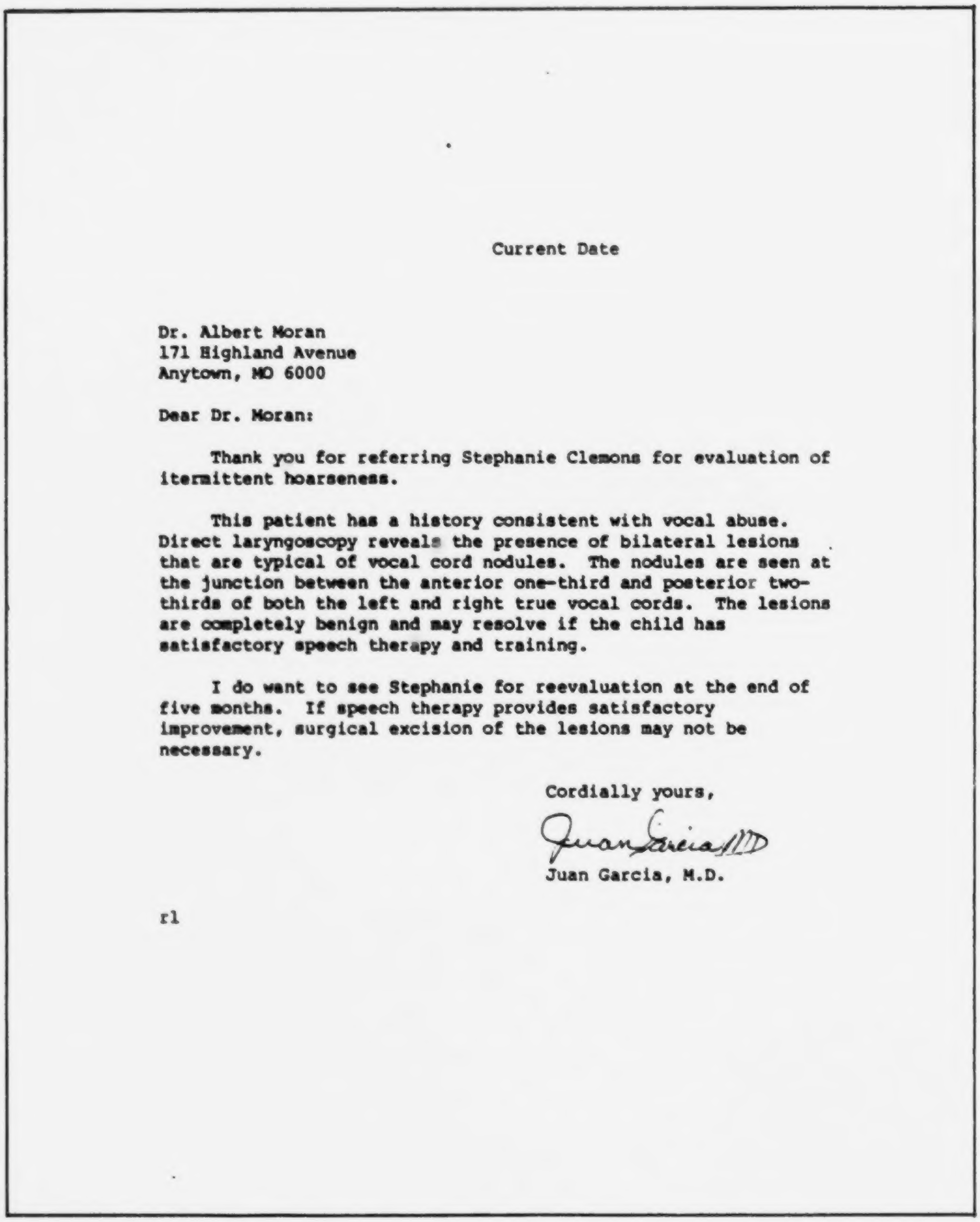
CASE 2: The secretary should thank Mr. Maxwell but refuse the invitation since it is not good policy to date patients. She should give a non-offensive reason for her refusal. If this person is someone she really wants to get to know better, she might discuss it with Dr. Garcia.

CASE 3: The secretary should have Dr. Garcia call the patient as soon as possible and then provide the patient's file for the doctor's reference.

CASE 4: The secretary should be polite but tell the patient that only the doctor can give medical advice.

CASE 5: The secretary should quickly assist the patient in a friendly and pleasant manner and make the patient feel as comfortable as possible. Try to avoid drawing undue attention to the patient's condition.

Assignment Sheet 15:



Current Date

Dr. Albert Moran
171 Highland Avenue
Anytown, MO 6000

Dear Dr. Moran:

Thank you for referring Stephanie Clemons for evaluation of itermittent hoarseness.

This patient has a history consistent with vocal abuse. Direct laryngoscopy reveals the presence of bilateral lesions that are typical of vocal cord nodules. The nodules are seen at the junction between the anterior one-third and posterior two-thirds of both the left and right true vocal cords. The lesions are completely benign and may resolve if the child has satisfactory speech therapy and training.

I do want to see Stephanie for reevaluation at the end of five months. If speech therapy provides satisfactory improvement, surgical excision of the lesions may not be necessary.

Cordially yours,

Juan Garcia MD

Juan Garcia, M.D.

rl

Assignment Sheet 16:

HEALTH INSURANCE CLAIM FORM

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

Save-More Insurance
2250 East Commerce
Chicago, IL 60650

TYPE OR PRINT ☐ MEDICARE ☐ MEDICAID ☐ CHAMPUS ☒ OTHER

PATIENT & INSURED (SUBSCRIBER) INFORMATION

1 PATIENT'S NAME (First name, middle initial, last name): Harvey Reeves

2 PATIENT'S DATE OF BIRTH: 06 | 10 | 43

3 INSURED'S NAME (First name, middle initial, last name): Harvey Reeves

4 PATIENT'S ADDRESS (Street, city, state, ZIP code):
1108 Vest
Anytown, MO 60000

5 PATIENT'S SEX: MALE ☒ ☐ FEMALE

6 INSURED'S I.D. No. or MEDICARE No. (include any letters): 400-58-6685

7 PATIENT'S RELATIONSHIP TO INSURED: SELF ☐ SPOUSE ☐ CHILD ☐ OTHER ☐

8 INSURED'S GROUP NO. (Or Group Name)

9 OTHER HEALTH INSURANCE COVERAGE - Enter Name of Policyholder and Plan Name and Address and Policy or Medical Assistance Number

10 WAS CONDITION RELATED TO
A PATIENT'S EMPLOYMENT: YES ☐ ☒ NO
B AN AUTO ACCIDENT: YES ☐ ☒ NO

11 INSURED'S ADDRESS (Street, city, state, ZIP code):
1108 Vest
Anytown, MO 60000

12 PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE (Read back before signing)
[illegible]
SIGNED DATE

13 I authorize payment of medical benefits to undersigned physician or supplier for service described below
SIGNED (Insured or Authorized Person)

PHYSICIAN OR SUPPLIER INFORMATION

14 DATE OF ◀ ILLNESS (FIRST SYMPTOM) OR INJURY (ACCIDENT) OR PREGNANCY (LMP)

15 DATE FIRST CONSULTED YOU FOR THIS CONDITION: 11/15/xx

16 HAS PATIENT EVER HAD SAME OR SIMILAR SYMPTOMS? YES ☐ ☒ NO

17 DATE PATIENT ABLE TO RETURN TO WORK: No Disability--

18 DATES OF TOTAL DISABILITY: FROM THROUGH

DATES OF PARTIAL DISABILITY: FROM THROUGH

19 NAME OF REFERRING PHYSICIAN

20 FOR SERVICES RELATED TO HOSPITALIZATION GIVE HOSPITALIZATION DATES: ADMITTED DISCHARGED

21 NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (if other than home or office): Office

22 WAS LABORATORY WORK PERFORMED OUTSIDE YOUR OFFICE? YES ☐ ☒ NO CHARGES

23 DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. RELATE DIAGNOSIS TO PROCEDURE IN COLUMN D BY REFERENCE TO NUMBERS 1, 2, 3, ETC. OR DX CODE

1 Rheumatic carditis with a. mitral stenosis
2 b. mitral insufficiency
3 c. probably subacute bacterial endocarditis
4

24 A DATE OF SERVICE	B* PLACE OF SERVICE	C PROCEDURE CODE (IDENTIFY)	FULLY DESCRIBE PROCEDURES, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN (EXPLAIN UNUSUAL SERVICES OR CIRCUMSTANCES)	D DIAGNOSIS CODE	E CHARGES	F
11/15/xx	3	90040	Office Visit	1	45 00	

25 SIGNATURE OF PHYSICIAN OR SUPPLIER (Read back before signing)
SIGNED DATE current

26 ACCEPT ASSIGNMENT (GOVERNMENT CLAIMS ONLY) - SEE BACK: YES ☐ ☒ NO

27 TOTAL CHARGE: 45 00

28 AMOUNT PAID: 0 0

29 BALANCE DUE: 45 00

30 YOUR SOCIAL SECURITY NO: 394-48-5696

31 Physicians or suppliers name, address, zip code & telephone no.
Dr. Juan Garcia
Anytown Medical Building
200 Hospital Hill
Anytown, MO 60000
I.D. No. T-33567

32 YOUR PATIENT'S ACCOUNT NO

33 YOUR EMPLOYER I.D. NO

*PLACE OF SERVICE CODES

1 — (IH) — INPATIENT HOSPITAL	4 — (H) — PATIENT'S HOME	7 — (NH) — NURSING HOME	O — (OL) — OTHER LOCATIONS
2 — (OH) — OUTPATIENT HOSPITAL	5 — DAY CARE FACILITY (PSY)	8 — (SNF) — SKILLED NURSING FACILITY	A — (IL) — INDEPENDENT LABORATORY
3 — (O) — DOCTOR'S OFFICE	6 — NIGHT CARE FACILITY (PSY)	9 — AMBULANCE	B — OTHER MEDICAL SURGICAL FACILITY

#1 A9380 — Medical Arts Press, Mpls., Mn. 55427

APPROVED BY AMA COUNCIL ON MEDICAL SERVICE 6-74

Assignment Sheet 17:

SARAH L. PETERS

Chief Complaint

Patient admitted to the Southwest Medical Center on 6/21--, at 11:45 a.m. with numerous injuries.

Present Illness

Patient was climbing the stairs to her front home entrance when her foot slipped off the last step, and she fell to the bottom of the stairs.

Past History

Patient has been in reasonably good health considering her age of 82 years.

Family History

Not relevant

Physical Examination

General:	Female, 82 years of age
Head & Neck:	Negative; Thyroid gland normal; No evidence of cervical lymphadenitis
Eyes:	Pupils equal and regular, react to light and accommodations
ENT:	Negative; Patient wears complete set of dentures
Chest:	Tender to palpation, both sides
Lungs:	Clear, resonant--minimal basilar rales
Heart:	Some degree of arrhythmia; Blood pressure 130/70
Abdomen:	Liver and spleen not palpable
Pelvic:	NA
Rectal:	Normal
Extremities:	Lower extremities normal. X-ray of upper extremities reveals fracture of right digital radius as well as a fracture of the right clavicle. There are several abrasions and contusions.

__Impression__

Multiple trauma including comminuted fracture of the right/distal radius, fracture of the right clavicle, and possible rib fracture.

Juan Garcia, M.D.

rl: 6/03/--

213

POSTTEST 1 - SCRIPT

FOR INSTRUCTORS ONLY:

Using tape or oral dictation, dictate the following letter.

This letter is to John Evans, M.D., 400 Medical Circle, Anytown, MO 60000. RE: David Downs, Automobile Accident of 7/10--(current year).

My office represents David Downs for injuries he received on 7/10--.

We need a detailed medical report which includes the following:

1. History of patient's injury
2. Subjective and objective complaints
3. Interpretation of tests and x-rays
4. Treatment rendered
5. Diagnosis and prognosis

Please include a duplicate copy of your bill for services rendered.

I am enclosing a medical authorization which gives permission for me to receive the requested information. Please bill us separately for this medical report.

Sincerely, Jason Smith, Smith and Adams, Attorneys-at-Law

POSTTEST 1

I. LISTING

A. List five types of service offices.

1.

2.

3.

4.

5.

B. List five skills required in service offices.

1.

2.

3.

4.

5.

C. List three qualifications that must be met in order to become a notary public.

1.

2.

3.

D. List the steps to be followed in applying for notary public certification.

1.

2.

3.

4.

5.

6.

II. TRUE/FALSE--Place a "T" in the blank if the statement is true. Place an "F" in the blank if the statement is false.

1. _____ In a legal document the right and left margins are the same.
2. _____ Legal documents are usually single-spaced.
3. _____ The title of a legal document is centered between margins.
4. _____ Signature lines in a legal document are 2 1/2" to 3" long.
5. _____ No corrections are allowed in a legal document.
6. _____ In legal documents, amounts are usually typed twice.
7. _____ A RE line is the same thing as a subject line.
8. _____ A notary may notarize a signature on a document when it has been signed before being brought to the office.
9. _____ A notary may certify that a document is a true copy of another document.
10. _____ A notary should require identification of the person requesting the notarization.

III. SHORT ANSWERS

Directions: Briefly discuss how you would handle each of the following situations.

1. Opal Smith has been waiting in your office for a few minutes. She asks if you can tell her what she should do about her illness so that she doesn't have to wait for the doctor.

2. A woman who sounds very excited calls and wants to talk to the doctor who is busy with a patient. She doesn't want to give her name--just wants to talk to the doctor--NOW.

3. A mother with three small children has been waiting to see the doctor. One of her children begins making paper airplanes out of the office magazines and throwing them around the waiting room. There are several other patients in the waiting room.

IV. FORMS PREPARATION

Directions:

1. You will need one copy of both pages of the Food Stamp Form.
2. Using the following data, complete the Food Stamp Form for Mrs. Sandra Young, 500 Any Street, Anytown, MO 60000.
3. Make 1 carbon copy.

Facts:

Mrs. Young will receive food stamps during the months of March through May. She will receive $75 each month. She will also receive $200 each month for AFDC and earns $100 each month from part-time work (a total of $300 monthly). She has medical expenses of $50 monthly.

V. DOCUMENT TYPING

Type the following legal document in correct form, beginning on line 10. You may use either plain paper or ruled legal cap. Indent paragraphs 10 spaces.

POWER OF ATTORNEY

¶ KNOW ALL MEN BY THESE PRESENTS that I, Rebecca McMurphy, 222 Second Street, Anytown, Missouri, do hereby appoint Bob Wells of 200 Court Street, Anytown, Missouri, my attorney, for me and in my name to deposit in all banks that I may have an account with all monies which shall come to his hands as such attorney and all bills of exchange, drafts, checks, promissory notes, and other securities for money payable or belonging to me, and for that purpose to sign my name and endorse the same for deposit or collection, and from time to time to withdraw any and all monies deposited with said banks, and for that purpose to draw checks in my name, and generally to do and perform all things necessary in or about the premises as fully and effectually in all respects as I could do if personally present.

¶ IN WITNESS WHEREOF, I have hereunto set my hand and seal this ______ day of ______, 19__. (Use current date)

______________________ (Seal)

VI. COMPOSING A LETTER

You are employed by the Protect-U Insurance Company and work for the manager, James Hoffman. Compose and type a form letter to be sent to your car insurance customers. You will enclose a printed statement that tells policyholders about new liability coverage that has been added to all policies. Policyholders will be receiving increased coverage at no added cost. If they have questions, they should call your office. Mr. Hoffman will sign the letter. Use the current date and address the letter you type to Mr. and Mrs. Mat Moon, 1243 Nice Street, Anytown, MO 60000.

VII. TRANSCRIPTION

Transcribe the letter provided by your instructor on tape or dictated by your instructor. Make 1 carbon copy. Use modified-block with indented paragraphs and mixed punctuation.

POSTTEST 1 KEY

I. LISTING

A. 1. Government
2. Financial
3. Insurance
4. Medical
5. Legal
6. (Others approved by instructor)

B. 1. Human relations
2. Typing
3. Letter composition
4. Word processing
5. Computer
6. Transcription

C. (Any three)

1. U.S. citizen
2. 18 years or older
3. Registered voter in county
4. County resident
5. State resident for 1 year
6. Read and write English
7. Commission has not been revoked during last 10 years

D. 1. Obtain application from County Clerk
2. Complete application and return to County Clerk
3. Take oath of office
4. Sign signature card
5. Provide bond
6. Purchase seal and stamp

II. TRUE/FALSE

1. F
2. F
3. T
4. T
5. F
6. T
7. T
8. F
9. T
10. T

III. SHORT ANSWERS

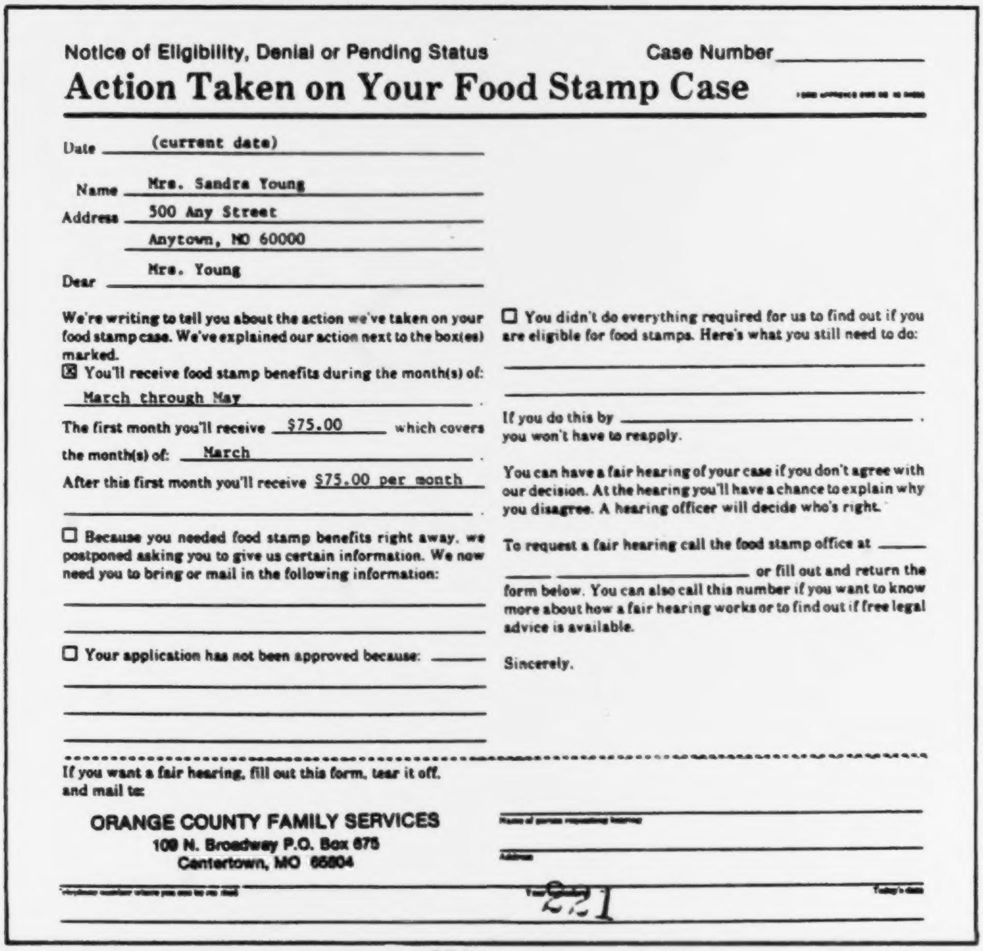
1. The secretary should not discuss Opal's illness with her. Only the doctor can give medical advice. The secretary could assure Opal that the doctor will see her soon.

2. The secretary should be calm and reassuring. Explain that the doctor is with a patient but that he/she will call this person as soon as he/she can if she will give her name and telephone number (or at least telephone number).

3. Students may suggest a variety of solutions to this case. The children might be encouraged to participate in some activity--perhaps coloring. The mother might be provided with some books to read to the children. The secretary could tactfully ask the airplane-throwing child to stop throwing them. If there is an open examination room, the mother and children might be placed there--assuming she will be seen by the doctor soon.

IV. FORMS PREPARATION

All necessary data should be typed in--neatly and correctly. The amount of earnings and medical expenses should be typed in on the second page of the form. The carbon copy should be neat.



Notice of Eligibility, Denial or Pending Status

Case Number ____________

Action Taken on Your Food Stamp Case

Date (current date)

Name Mrs. Sandra Young

Address 500 Any Street

Anytown, MO 60000

Dear Mrs. Young

We're writing to tell you about the action we've taken on your food stamp case. We've explained our action next to the box(es) marked.

☒ You'll receive food stamp benefits during the month(s) of: March through May.

The first month you'll receive $75.00 which covers the month(s) of: March.

After this first month you'll receive $75.00 per month

☐ Because you needed food stamp benefits right away, we postponed asking you to give us certain information. We now need you to bring or mail in the following information:

☐ Your application has not been approved because: ______

☐ You didn't do everything required for us to find out if you are eligible for food stamps. Here's what you still need to do:

If you do this by ____________ you won't have to reapply.

You can have a fair hearing of your case if you don't agree with our decision. At the hearing you'll have a chance to explain why you disagree. A hearing officer will decide who's right.

To request a fair hearing call the food stamp office at ____________ or fill out and return the form below. You can also call this number if you want to know more about how a fair hearing works or to find out if free legal advice is available.

Sincerely,

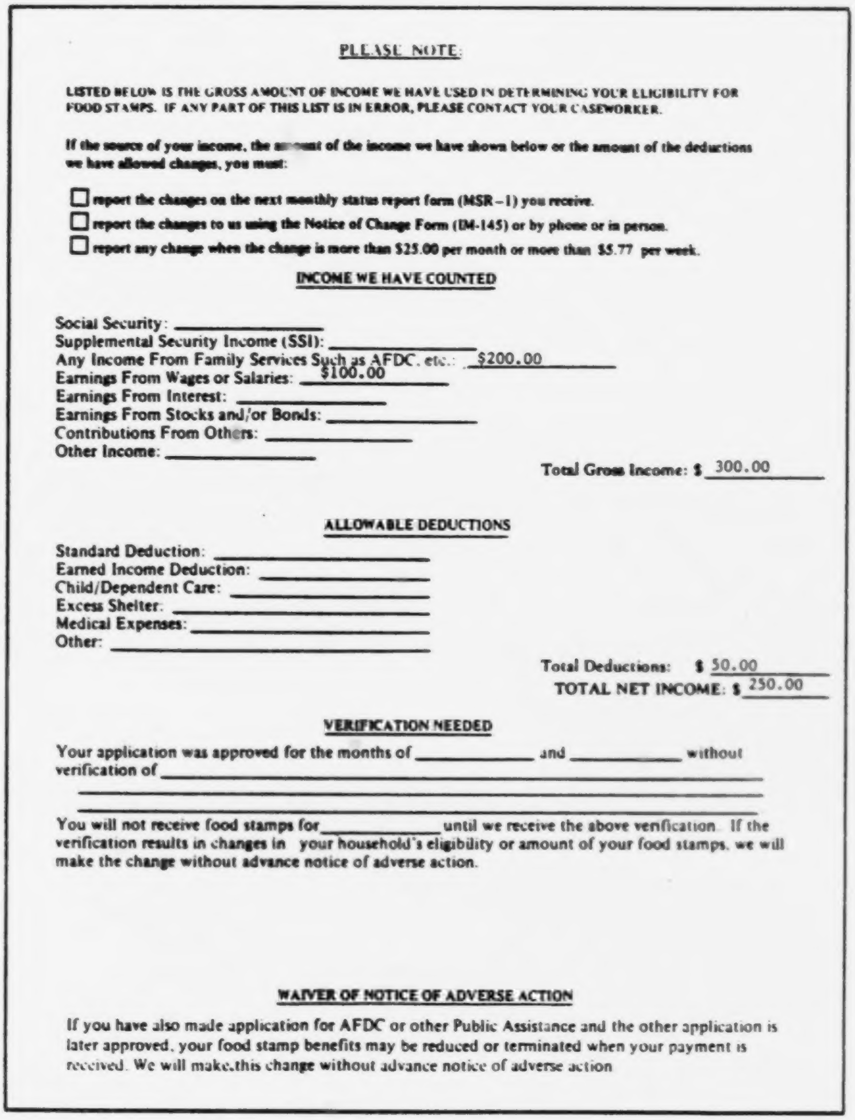
If you want a fair hearing, fill out this form, tear it off, and mail to:

ORANGE COUNTY FAMILY SERVICES
109 N. Broadway P.O. Box 675
Centertown, MO 65804

Address

Today's date

221



PLEASE NOTE:

LISTED BELOW IS THE GROSS AMOUNT OF INCOME WE HAVE USED IN DETERMINING YOUR ELIGIBILITY FOR FOOD STAMPS. IF ANY PART OF THIS LIST IS IN ERROR, PLEASE CONTACT YOUR CASEWORKER.

If the source of your income, the amount of the income we have shown below or the amount of the deductions we have allowed changes, you must:

☐ **report the changes on the next monthly status report form (MSR–1) you receive.**
☐ **report the changes to us using the Notice of Change Form (IM-145) or by phone or in person.**
☐ **report any change when the change is more than $25.00 per month or more than $5.77 per week.**

INCOME WE HAVE COUNTED

Social Security: ____________
Supplemental Security Income (SSI): ____________
Any Income From Family Services Such as AFDC, etc.: $200.00
Earnings From Wages or Salaries: $100.00
Earnings From Interest: ____________
Earnings From Stocks and/or Bonds: ____________
Contributions From Others: ____________
Other Income: ____________

Total Gross Income: $ 300.00

ALLOWABLE DEDUCTIONS

Standard Deduction: ____________
Earned Income Deduction: ____________
Child/Dependent Care: ____________
Excess Shelter: ____________
Medical Expenses: ____________
Other: ____________

Total Deductions: $ 50.00
TOTAL NET INCOME: $ 250.00

VERIFICATION NEEDED

Your application was approved for the months of ____________ and ____________ without verification of ____________

You will not receive food stamps for ____________ until we receive the above verification. If the verification results in changes in your household's eligibility or amount of your food stamps, we will make the change without advance notice of adverse action.

WAIVER OF NOTICE OF ADVERSE ACTION

If you have also made application for AFDC or other Public Assistance and the other application is later approved, your food stamp benefits may be reduced or terminated when your payment is received. We will make this change without advance notice of adverse action

V. DOCUMENT TYPING

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS that I, Rebecca McMurphy, 222 Second Street, Anytown, Missouri, do hereby appoint Bob Wells of 200 Court Street, Anytown, Missouri, my attorney, for me and in my name to deposit in all banks that I may have an account with all monies which shall come to his hands as such attorney and all bills of exchange, drafts, checks, promissory notes, and other securities for money payable or belonging to me, and for that purpose to sign my name and endorse the same for deposit or collection, and from time to time to withdraw any and all monies deposited with said banks, and for that purpose to draw checks in my name, and generally to do and perform all things necessary in or about the premises as fully and effectually in all respects as I could do if personally present.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this _______________ day of _______________, 19--. (current date)

____ (Seal)

VI. COMPOSING A LETTER

Teacher evaluation should consider the following criteria:

1. Is the letter mailable?
2. Is the information accurate?
3. Is the information clear and concise?

VII. TRANSCRIPTION

Current Date

John Evans, M.D.
400 Medical Circle
Anytown, MO 60000

Dear Dr. Evans:

Re: David Downs, Automobile Accident of 7/10/--

My office represents David Downs for injuries he received on 7/10--.

We need a detailed medical report which includes the following:

1. History of patient's injury
2. Subjective and objective complaints
3. Interpretation of tests and X-rays
4. Treatment rendered
5. Diagnosis and prognosis

Please include a duplicate copy of your bill for services rendered.

I am enclosing a medical authorization which gives permission for me to receive the requested information. Please bill us separately for this medical report.

Sincerely,

Jason Smith
SMITH AND ADAMS
ATTORNEYS-AT-LAW

POSTTEST 2—SCRIPT

FOR INSTRUCTORS ONLY:

Using a tape or oral dictation, dictate the following letter. You may wish to use current dates.

This letter is to Mr. Earl Brilhort, Box 55, Anytown, MO, 60000. Dear Mr. Brilhort. RE: Abstract of Title to: The South 58 feet of Lots 141 and 142 in the Original Town of Anytown, in Orange County, Missouri.

At your request I have examined the Abstract of Title as continued by the Orange County Title Company and which bears their final certificate No. 8717, dated the 29th of June, 1984, at 8 a.m. and which covers the above-described real estate.

From this examination I am of the opinion that merchantable title is vested in R. L. Garrett and Juanita A. Garrett, husband and wife, as tenants by the entirety, subject to the following:

1. I am informed by other sources that R. L. Garrett is deceased. In the event that this is correct, then there should be prepared and filed for record an affidavit to the effect that R. L. Garrett is deceased, the date of his death and a recitation that at the time of his death he and Juanita A. Garrett were husband and wife, never having been divorced or remarried.

2. There is no showing that special assessments or taxes of the City of Anytown have been paid. Prior to the closing of this transaction you should ascertain that all such special assessments and city taxes have been paid up to and including the year 1983.

County taxes for 1983 and prior years are shown as paid. Taxes for 1984 have been assessed, and as such, are a lien on the premises, but if paid prior to January 1, 1984, are not delinquent. It should be ascertained if any recent improvements have been made on the premises, and if so, that all accounts have been paid in full. If you are not satisfied with apparent boundaries, I suggest that a survey be had to determine their exact location.

Assuming the abstract to be complete and correct, and subject to the rights of any persons in possession, title is as shown above.

Sincerely, Jason Smith, Attorney-at-Law

POSTTEST 2

I. LISTING

A. List five types of service offices.

1.

2.

3.

4.

5.

B. List five skills required in service offices.

1.

2.

3.

4.

5.

C. List three qualifications that must be met in order to become a notary public.

1.

2.

3.

D. List the steps to be followed in applying for notary certification.

1.

2.

3.

4.

5.

6.

II. TRUE/FALSE--Place a "T" in the blank if the statement is true. Place an "F" in the blank if the statement is false.

1. _____ Printed forms in law offices are called law blanks.

2. _____ In a legal document the right and left margins are equal.

3. _____ In legal documents legal descriptions are usually double-spaced.

4. _____ In legal documents amounts are usually typed twice.

5. _____ Signature lines in legal documents are usually 3 1/2" to 4" long.

6. _____ Witnesses sign a legal document on the left side.

7. _____ Except for names, dates, and amounts, neat corrections are generally allowed in legal documents.

8. _____ In order to notarize a signature, the notary should require that the document be signed in his or her presence.

9. _____ It is not necessary to require identification of the person requesting a notarization.

10. _____ Notary certification is good for a ten-year period.

III. SHORT ANSWER

Directions: Briefly discuss how you would handle each of the following situations:

1. Mrs. James has been waiting to see the doctor for about 30 minutes. The doctor is about one hour behind in seeing patients. Mrs. James is getting impatient and says: "Just WHEN will the doctor see me? I've been waiting for 30 minutes. I need to get back to my job."

2. A patient calls and immediately begins describing his symptoms to you. He then asks what treatment you suggest.

3. A patient calls about her small child who is running a high fever. The doctor is with a patient but can be interrupted at this point.

IV. FORMS PREPARATION

Using the following data, complete the Food Stamp Form for Mr. Peter Sheldon, 300 Any Street, Anytown, MO 60000.

Mr. Sheldon has not given your office all necessary information in order for you to determine his eligibility for food stamps. You need verification of his bank account. If you receive this verification within ten days from the current date (be sure it's a weekday), he will not have to reapply.

V. DOCUMENT TYPING

Type the following legal document in correct form, beginning on line 10. You may use either plain paper or ruled legal cap. Indent paragraphs 10 spaces.

MUTUAL CANCELLATION AGREEMENT

THIS AGREEMENT, made and entered into this fifth day of October, 19-- (current year), by and between P.C. MICOLS COMPANY, a Missouri corporation, hereinafter referred to as "landlord" and ABC CO., INC., a Missouri corporation, hereinafter referred to as "tenant,"

WITNESSETH, That

WHEREAS, by written lease dated January 20, 19--, (use previous year) and amended by Amendment to Lease dated May 10, 19--, (use ~~year~~ same year as before) the landlord leased to the tenant the following described premises:

Storeroom Number 15 on the marquee level
SS-7 of Seville Square at 400 Micols Road,
Kansas City, Missouri 64112

for a term of five (5) years, running from May 15, 19--, (same year as before) up to and including April 16, 19--, (year five years from beginning year)

WHEREAS, the parties hereto are desirous of canceling the above lease as of May 15, 19--, (current year)

IN CONSIDERATION OF the payment by tenant to the landlord of five thousand dollars ($5,000) evidenced by tenant's

Promissor Note dated the date hereof, the parties hereto do hereby agree that the above lease shall be and is hereby canceled as of midnight, May 15, 19--. (current date)

IN WITNESS WHEREOF, the parties hereto have executed these presents the day and year first above written.

P.C. MICOLS COMPANY

By ____________________

ABC CO., INC.

By ____________________

VI. COMPOSING A LETTER

You are employed by the Protect-U Insurance Company and work for the manager, James Hoffman. Mr. Hoffman has been suddenly called out of town for personal reasons. Compose and type a letter to Mr. and Mrs. Evert Adams, 3356 Tenth Street, Anytown, MO 60000, telling them that Mr. Hoffman is out of town and will not be able to keep the appointment with them on Wednesday of this week. Mr. Hoffman will return next Thursday.

VII. TRANSCRIPTION

Transcribe the letter provided by your instructor on tape or dictated by your instructor. Make one carbon copy. Use modified-block style with indented paragraphs and mixed punctuation.

POSTTEST 2 KEY

I. LISTING

A.
1. Government
2. Financial
3. Insurance
4. Medical
5. Legal
6. (Others approved by instructor)

B.
1. Human relations
2. Typing
3. Letter composition
4. Word processing
5. Computer
6. Transcription

C. (Any three)

1. U.S. citizen
2. 18 years or older
3. Registered voter in county
4. County resident
5. State resident for 1 year
6. Read and write English
7. Commission has not been revoked during last 10 years

D.
1. Obtain application from County Clerk
2. Complete application and return to County Clerk
3. Take oath of office
4. Sign signature card
5. Provide bond
6. Purchase seal and stamp

II. TRUE/FALSE

1. T
2. F
3. F
4. T
5. F
6. T
7. T
8. T
9. F
10. F

III. SHORT ANSWERS

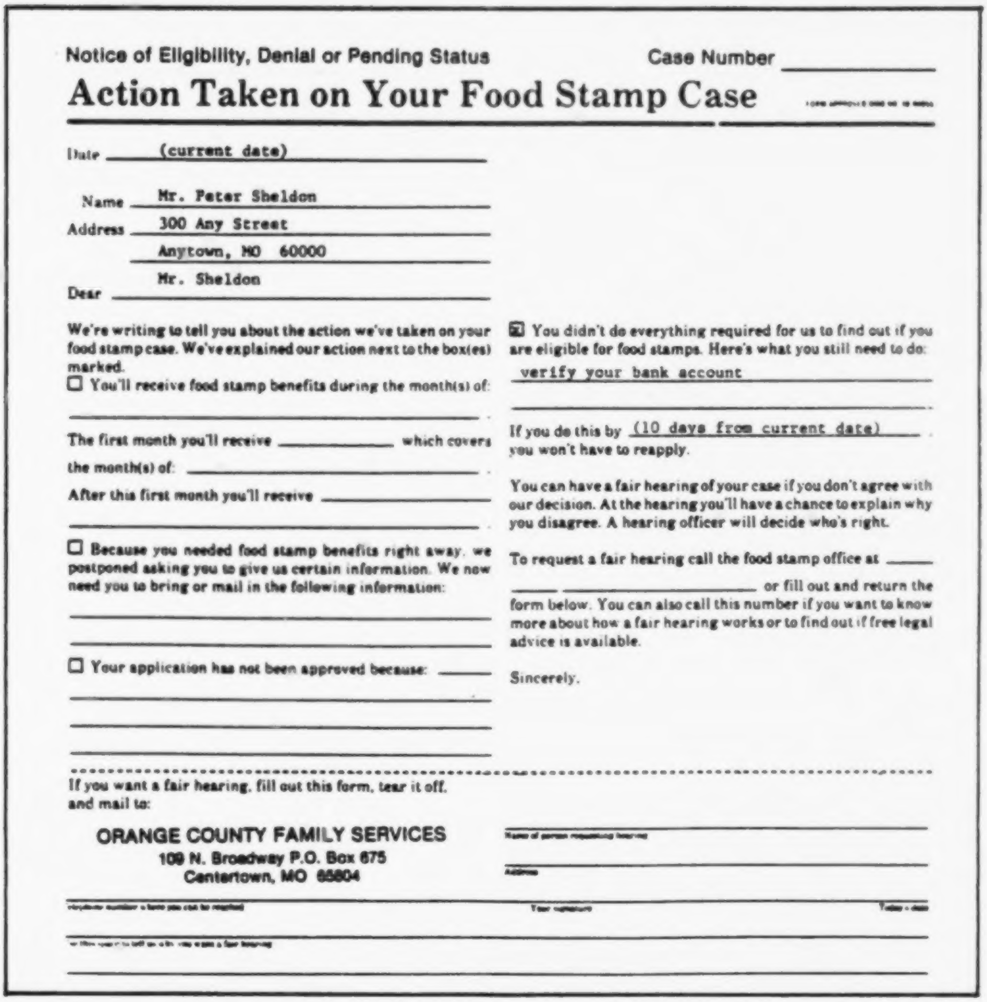
1. Calmly assure Mrs. James that the doctor will see her as soon as possible. Perhaps the doctor has been delayed by some event such as an emergency. Offer to let her call her place of employment if she needs to tell them she will be delayed.

2. Under no circumstances should you give medical advice. If the doctor is free, have him/her talk with the patient. If not, get the patient's name and telephone number and have the doctor call as soon as possible.

3. Transfer the call to the doctor and provide the doctor with the child's file as soon as possible so that the doctor can refer to it while discussing the patient.

IV. FORMS PREPARATION

All necessary data should be typed in--neatly and correctly. The correct data should be filled in on the back of the form as well.



Notice of Eligibility, Denial or Pending Status

Case Number ____________

Action Taken on Your Food Stamp Case

Date (current date)

Name Mr. Peter Sheldon
Address 300 Any Street
Anytown, MO 60000

Dear Mr. Sheldon

We're writing to tell you about the action we've taken on your food stamp case. We've explained our action next to the box(es) marked.

☐ You'll receive food stamp benefits during the month(s) of: ____________

The first month you'll receive ________ which covers the month(s) of: ____________

After this first month you'll receive ____________

☐ Because you needed food stamp benefits right away, we postponed asking you to give us certain information. We now need you to bring or mail in the following information: ____________

☐ Your application has not been approved because: ____________

☒ You didn't do everything required for us to find out if you are eligible for food stamps. Here's what you still need to do: verify your bank account

If you do this by (10 days from current date), you won't have to reapply.

You can have a fair hearing of your case if you don't agree with our decision. At the hearing you'll have a chance to explain why you disagree. A hearing officer will decide who's right.

To request a fair hearing call the food stamp office at ____________ or fill out and return the form below. You can also call this number if you want to know more about how a fair hearing works or to find out if free legal advice is available.

Sincerely,

If you want a fair hearing, fill out this form, tear it off, and mail to:

ORANGE COUNTY FAMILY SERVICES
109 N. Broadway P.O. Box 675
Centertown, MO 65804

Name of person requesting hearing ____________

Address ____________

Your signature ____________

PLEASE NOTE:

LISTED BELOW IS THE GROSS AMOUNT OF INCOME WE HAVE USED IN DETERMINING YOUR ELIGIBILITY FOR FOOD STAMPS. IF ANY PART OF THIS LIST IS IN ERROR, PLEASE CONTACT YOUR CASEWORKER.

If the source of your income, the amount of the income we have shown below or the amount of the deductions we have allowed changes, you must:

- ☐ **report the changes on the next monthly status report form (MSR – 1) you receive.**
- ☐ **report the changes to us using the Notice of Change Form (IM-145) or by phone or in person.**
- ☐ **report any change when the change is more than $25.00 per month or more than $5.77 per week.**

INCOME WE HAVE COUNTED

Social Security: ____________
Supplemental Security Income (SSI): ____________
Any Income From Family Services Such as AFDC, etc.: ____________
Earnings From Wages or Salaries: ____________
Earnings From Interest: ____________
Earnings From Stocks and/or Bonds: ____________
Contributions From Others: ____________
Other Income: ____________

Total Gross Income: $____________

ALLOWABLE DEDUCTIONS

Standard Deduction: ____________
Earned Income Deduction: ____________
Child/Dependent Care: ____________
Excess Shelter: ____________
Medical Expenses: ____________
Other: ____________

Total Deductions: $ ____________
TOTAL NET INCOME: $____________

VERIFICATION NEEDED

Your application was approved for the months of ____________ and ____________ without verification of ____

You will not receive food stamps for ____________ until we receive the above verification. If the verification results in changes in your household's eligibility or amount of your food stamps, we will make the change without advance notice of adverse action.

WAIVER OF NOTICE OF ADVERSE ACTION

If you have also made application for AFDC or other Public Assistance and the other application is later approved, your food stamp benefits may be reduced or terminated when your payment is received. We will make this change without advance notice of adverse action

MUTUAL CANCELLATION AGREEMENT

THIS AGREEMENT, made and entered into this fifth day of October, 19--, by and between P. C. MICOLS COMPANY, a Missouri corporation, hereinafter referred to as "landlord" and ABC CO., INC., a Missouri corporation, hereinafter referred to as "tenant,"

WITNESSETH, That

WHEREAS, by written lease dated January 20, 19--, and amended by Amendment to Lease dated May 10, 19--, the landlord leased to the tenant the following described premises:

> Storeroom Number 15 on the marquee level of Seville Square at 400 Micols Road, Kansas City, Missouri 64112

for a term of five (5) years, running from May 15, 19--, up to and including April 16, 19--,

WHEREAS, the parties hereto are desirous of canceling the above lease as of May 15, 19--,

IN CONSIDERATION OF the payment by tenant to the landlord of five thousand dollars ($5,000) evidenced by tenant's Promissory Note dated the date hereof, the parties hereto do hereby agree that the above lease shall be and is hereby canceled as of midnight, May 15, 19--.

IN WITNESS WHEREOF, the parties hereto have executed these presents the day and year first above written.

P. C. MICOLS COMPANY

By ______________________________

ABC CO., INC.

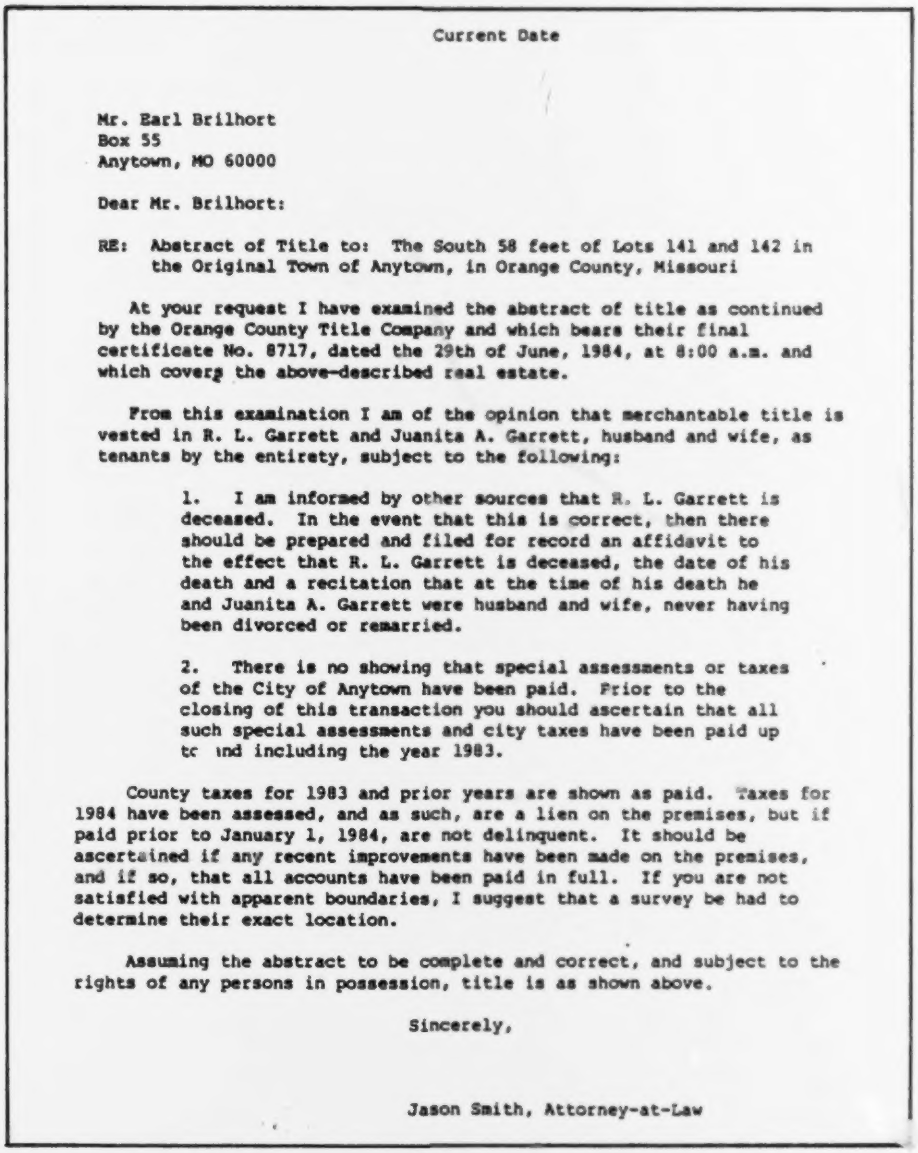
By ______________________________

VI. COMPOSING A LETTER

The letter should include an enclosure notation. Teacher evaluation should be based upon the following:

1. Is the letter mailable?
2. Is all information accurate?
3. Is all information clear?
4. Is the enclosure notation typed correctly?

VII. TRANSCRIPTION



Current Date

Mr. Earl Brilhort
Box 55
Anytown, MO 60000

Dear Mr. Brilhort:

RE: Abstract of Title to: The South 58 feet of Lots 141 and 142 in the Original Town of Anytown, in Orange County, Missouri

At your request I have examined the abstract of title as continued by the Orange County Title Company and which bears their final certificate No. 8717, dated the 29th of June, 1984, at 8:00 a.m. and which covers the above-described real estate.

From this examination I am of the opinion that merchantable title is vested in R. L. Garrett and Juanita A. Garrett, husband and wife, as tenants by the entirety, subject to the following:

1. I am informed by other sources that R. L. Garrett is deceased. In the event that this is correct, then there should be prepared and filed for record an affidavit to the effect that R. L. Garrett is deceased, the date of his death and a recitation that at the time of his death he and Juanita A. Garrett were husband and wife, never having been divorced or remarried.

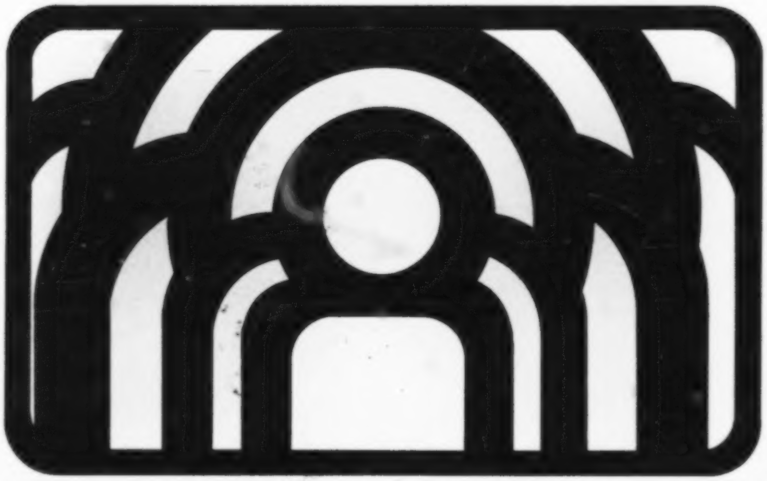
2. There is no showing that special assessments or taxes of the City of Anytown have been paid. Prior to the closing of this transaction you should ascertain that all such special assessments and city taxes have been paid up to and including the year 1983.

County taxes for 1983 and prior years are shown as paid. Taxes for 1984 have been assessed, and as such, are a lien on the premises, but if paid prior to January 1, 1984, are not delinquent. It should be ascertained if any recent improvements have been made on the premises, and if so, that all accounts have been paid in full. If you are not satisfied with apparent boundaries, I suggest that a survey be had to determine their exact location.

Assuming the abstract to be complete and correct, and subject to the rights of any persons in possession, title is as shown above.

Sincerely,

Jason Smith, Attorney-at-Law



Increasing Personal Development

UNIT XII: Increasing
Personal Development

Unit XII - Personal Development

UNIT OBJECTIVE

After completion of this unit, the student will be able to prioritize tasks, identify proper business dress, set personal and career goals, and demonstrate proper business conduct needed for successful entry into the world of work.

LESSON OBJECTIVES

1. Given tasks for a five-day work week, the student will prepare a time schedule with 90 percent accuracy within 90 minutes.

2. Given guidelines for business dress, the student will identify appropriate apparel for the office with 90 percent accuracy within 30 minutes.

3. Given ten case problems concerning proper employment behavior, the student will identify the issue with 90 percent accuracy within 50 minutes.

4. Given a career assignment sheet, the student will assess a career choice listing its requirements and working conditions with 90 percent accuracy within 50 minutes.

COMPETENCIES

Increasing Personal Development

1. Prepare a time schedule for one week of office work
2. Describe appropriate office apparel
3. Explain issues concerning proper employment behavior
4. Identify requirements and working conditions for office careers

REFERENCES

I. Books and Pamphlets

A. Crosswait, C. Bruce and Wilkes, Mary. Professional Development: The Dynamics of Success. New York: Harcourt Brace Jovanovich, 1981.

B. Dean, Dale. Keeping the Job. St. Louis: Milliken Publishing Company, 1980.

C. Everard, Kenneth E., and Burrow, Jim. Business Principles and Management, 8th ed. Cincinnati: South-Western Publishing Co., 1984.

D. Johnson, Jeane G. Clothing: Image & Impact. Cincinnati: South-Western Publishing Co., 1983.

E. Kutie, Rita C., and Rhodes, Joan L. Secretarial Procedures for the Electronic Office. New York: John Wiley and Sons, Inc., 1983.

F. "Performance Appraisal Record," Office Guide. Vol. 31, No. 23, December 15, 1983, p. 6.

G. Posner, Mitchell J. Executive Essentials. New York: Avon Books, 1982.

H. Thompson, Jacqueline. The Aspiring Woman's Personal Packaging Program. New York: A&W Publishers, Inc., 1981.

I. Wagoner, Kathleen P., and Ruprecht, Mary M. Office Automation: A Management Approach. New York: John Wiley and Sons, Inc., 1984.

II. Software*

*Software descriptions have been taken directly from the publishers and/or vendors.

A. Expectations on the Job. For: Apple II; IIe; IIc; TRS-80 Model III or 4; IBM PC

Expectations of employers and co-workers are discussed and students are taught the importance of compromising in order to keep a job. Typical situations are presented and students are asked to choose the best course of action. Maintaining a good attitude, working habits, and using proper communication skills on the job are emphasized. Students learn the importance of establishing a good rapport with co-workers. The program takes one full class period plus time for follow-up reading and exercises in the included 12-page book: Keeping a Job Now That You Have It. Available from Career Aids, Inc., 20417 Nordhoff St., Dept. TE9, Chatsworth, CA 91311.

B. First Day on the Job. For: Apple II.

This software shows students how to make a good impression covering clothing, grooming, promptness, and understanding instructions. A simulation allows students to select a job situation for either a factory, restaurant, or office. In addition, they experience making various decisions arising from simulated conditions. Available from Teaching Aids Incorporated, P.O. Box 1798, Cosa Mesa, CA 92628-0798.

C. The Values Auction, 1983. For: Apple II; II+; IIe; TRS-80 III.

This microcomputer game is designed to introduce the importance of exploring major reward systems in various work environments. The student bets against the computer for one of nine major work values. The gaming approach teaches the student that people work for many different reasons and that effective planning can help to accumulate and wisely use work rewards. Available from American Micro Media, P.O. Box 306, Red Hook, NY 12571.

D. Work Habits for Job Success. For: Apple II; IIe; IIc.

Your students learn how attitude and performance ultimately affect job success. Students are taught how to keep a job and develop habits that lead to receiving promotions. Simulated exercises give students a better understanding of what lies ahead in the job market. Worksheets and activity ideas provided in this computer program allow students to gain valuable insight, increase their awareness, and learn the key elements of achieving success. Available from Career Aids, Inc., 20417 Nordhoff St., Dept. TB9, Chatsworth, CA 91311.

LESSON OBJECTIVE

Given tasks for a five-day work week, prepare a time schedule with 90 percent accuracy within 90 minutes.

SUGGESTED ACTIVITIES

I. Instructor

A. Prepare transparencies.

B. Provide objectives and information sheets for students.

C. Explain information on sheets and transparencies.

D. Assign Assignment Sheets 1 and 2. Evaluate these projects with each student.

E. Give posttest.

II. Student

A. Read and discuss objectives and information sheets.

B. Study information presented on the transparencies.

C. Complete both Assignment Sheets.

D. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Transparency Masters

A. TM 1: Efficiency: Doing the Job Right
B. TM 2: Effectiveness: Doing the Job Right
C. TM 3: Time Equals Money
D. TM 4: Annual Report Preparation: The "Swiss Cheese" Approach
E. TM 5: Planning Work
F. TM 6: Number 1 Importance = Number 1 Priority
G. TM 7: Learn to Follow Directions

IV. Assignment Sheets and Answers

- A. AS 1: Planning Your Activities
- B. AS 2: Preparing a "To Do" List and Daily Plans

V. Posttest and Key

INFORMATION SHEET

I. Time Management through Efficiency and Effectiveness

A. Efficiency = producing the desired result with minimum effort, expense, and waste; judging the relative values of tasks when measured in terms of time, energy, and supplies (TM 1)

B. Effectiveness = doing the right job to accomplish the desired result (TM 2)

C. Efficiency + effectiveness = reduced costs (TM 3)

II. Time Management through Organizing Work

A. Divide large projects into manageable segments of work. Use the "Swiss cheese" approach in tackling a large task: (TM 4)

1. Use bits of time (5-10 minutes) to "bite" holes in a large task.

2. Don't bite the same hole out of the cheese twice.

3. Once you've started, you've given yourself the opportunity to continue.

B. Group related but isolated tasks to reduce the time consumed in changing from one task to another.

C. Match the work to the time frames within which it must be performed.

III. Time Management through Efficient Work Habits

A. Learn the job.

1. Before you can organize work and take creative initiative, you must understand the job. Organize your day's work to interface with that of your supervisor; do not expect your supervisor to adjust to your work schedule.

2. During orientation:

a. Take notes and ask questions that will help you understand.

b. Be alert to procedures, sources of information and supplies, and items which receive priority.

c. Be certain that you understand the follow-up file organization and procedures.

d. Note your supervisor's work habits, preferences, and related details.

B. Adopt a flexible plan. (TM 5)

1. High-volume producers recommend planning work and then following the plan.

2. Saving the supervisor's time is a major responsibility for office workers. Decrease interruptions in your supervisor's work schedule and assist him/her by collecting/verifying/assembling necessary materials.

3. Begin the most important job first and continue adjusting your plan so that you can meet the deadlines.

4. Learn priorities: (TM 6)

a. Listen to your supervisor's instructions and requests. (TM 7)

b. Notice when information flows in and out of your office.

5. Insert unstructured time periods of fifteen minutes, and occasionally thirty minutes, at intervals during the day as you schedule your supervisor's appointments and plan your activities.

6. You must recognize that your work schedule is governed not only by your supervisor's goals and deadlines but also by the established schedules for your organization's information flow.

7. To plan effectively:

a. Block out planning time. Set aside a period of each day for thinking, reflecting, and planning so that you can organize your thoughts about where you're going and how today will help you get there.

b. Block out committed time--time over which you have no control.

c. Schedule your important deadlines and set intermediate goals for portions of the final project.

d. Design a flexible schedule.

1) Estimate how much time you think an activity or task will take and multiply that amount by 1.25.

        2) If the task is new or uncertain, estimate the time and multiply it by 1.5.

        3) Schedule only 50 percent of your time.

    e. Avoid overcommitting your time.

        1) Do low-priority items only when the high-priority items have been completed.

        2) Avoid completing tasks of little or no consequence. When you have something to do, ask yourself, "Is it really necessary?"

    f. Make the most of prime time--the time when you are most effective.

    g. Look for ways to better use committed time. Streamline work habits; develop new methods.

    h. Instead of saying "I'm unorganized" or "I don't have enough time," say "I've chosen to be that way in the past but today I'm going to use the time I have in a better way."

    i. Use your strengths.

C. Manage details.

1. Record information:

    a. Keep a notebook for recording instructions from your supervisor, especially directions pertaining to communications and procedures.

    b. Keep a pad and a pencil by the telephone for recording names, numbers, and facts.

    c. Maintain a "To Do" list on which to write reminders.

2. Record facts as soon as they become available to you. DO IT NOW! Think with a pen in your hand.

3. Handle each piece of paper once. Use checkmarks, initials, codes, symbols to indicate the status of each piece of paper that comes across your desk. If for some unavoidable reason you can't, do something to move the project that it represents ahead every time you pick up the paper. Annotate the paper with action needed and progress made so that time is not wasted by having to reread to determine need/status.

4. When you encounter a new task, first decide how you are going to perform the task and then be consistent in doing it.

5. Cross out the reminders of tasks as you complete them but carefully go over your list and transfer the reminders of tasks remaining on your "To Do" list for the following day.

6. Discard unnecessary paper and junk mail before you are tempted to read it.

7. Classify paperwork as it arrives: immediate action, pending, or information.

8. When something is no longer "active" but must be retained, file it immediately!

D. Work at one task at a time.

1. Schedule work so that you can concentrate on one task until it is completed or until you get to a logical stopping point. If a stopping point does not exist, try to work at one task for two hours. Jumping from one task to another is confusing.

2. As thoughts about other duties flash across your mind, write each usable thought on your "To Do" list and continue to concentrate on the work at hand. Avoid interrupting yourself to perform another task the minute you think of it.

3. Work at an uncluttered desk. On the immediate working area of your desk, put only the materials you need for the task upon which you are working. Since you can give attention to only one main task at a time, put the other work aside, carefully organized and labeled.

E. Start the day with a difficult task.

1. Begin your day--the time you spend before you arrive at work--in an unhurried way so that you will not need the first thirty minutes to "put yourself together."

2. Arrive early, go over your plans for the day (which you prepared the day before), and tackle a task which requires much concentration and effort on your part, either a difficult task or one that you dislike.

3. Make the first hour one of accomplishment, not one in which you get ready to work.

4. Do not use the beginning of the day to perform easy tasks that can provide relaxation at intervals during the day.

F. Combine similar tasks and conquer them.

1. You can save time and energy when you eliminate shifting from one task to another.

2. Different work requires different degrees of concentration and a separate pace. Group the tasks that require the same degree of concentration in order to control your pace.

3. Group tasks to increase effectiveness. (A telephone call conveys an impression of the organization to the receiver. By grouping your telephone calls, you can give them your complete attention and project your personality in a thoughtful, businesslike way.)

4. Assemble enough work together to keep you busy for at least one hour.

G. Program relaxation into your schedule.

1. To maintain your best production rate throughout the day and the week, experiment with alternating difficult and easy tasks to establish the best combination for conserving your energy.

2. Once you discover which tasks are easy for you, use them to provide relaxation between difficult tasks.

3. Start your day with a difficult task and work vigorously but not frantically so that you do not become fatigued during the first hours.

4. Throughout the day, alternate difficult and easy tasks. Alternate sitting and standing whenever possible. When you cannot change the task, change the pace.

5. After lunch, morning, and afternoon breaks, promptly tackle difficult tasks; do not lose time wondering what to do.

6. Save easy tasks for late in the day.

7. Plan the duration and frequency of peak loads. Determine what preparation you can make to lessen the peak load.

H. Get it right the first time.

1. Plan each task before you begin, focus on the exactness of the details as you perform the task, and then verify that the task is completed.

2. Waste occurs when a piece of work that could have been finished on the first try must be redone because the task is still undone, the time allocated for doing it has already been used, and other work has accumulated.

3. Before you begin a task, be certain that you understand the instructions, look up facts, visualize the work in its finished form, and make a plan.

4. Know how well the job must be done, and when you achieve that level, go on. If perfection isn't necessary, don't waste time achieving it.

I. Use bits and pieces of time.

1. Early in the day, use bits of time to carry out those tasks that must be completed that day.

2. Use bits of time to plan any long, complicated project.

3. Routine work, such as clipping newspaper and magazine articles, opening and reading advertising mail, and checking supplies, can be done during slack periods.

4. Use bits and pieces of time for putting papers and tools away. Try to put away whatever you are using as soon as you finish with it, but when you find it impossible to do so, schedule this activity during the least busy part of the day.

5. Use waiting time.

6. Look for tasks that can be done in a few minutes or seconds.

7. Use slack periods to decrease your list of work to be done sometime and to get an early start on the complicated projects coming up next.

J. Prepare in advance.

1. Be deliberate. Take time to study a job until you can visualize it to its completion, regardless of how complicated or lengthy it is.

2. Do not permit your thinking about a complicated future job to interfere with getting today's work finished. Do one job at a time.

3. You accomplish nothing by merely thinking about a task. Start by jotting down your thoughts at random. Organize them later. Estimate the time needed to complete each part of it. Start with the completion date and work back to the current date to set intermediate deadlines.

4. As you prepare a large block of work in advance, plan carefully so that you can put it aside until you are ready to perform the job. Label a folder for the assignment and put everything pertaining to it in that folder. Budget your time for completing the assignment. Allow some time for delays. Keep careful notes to detail project status. Once you start the actual performance of the assignment, make a daily check of the work completed against the projected time schedule.

5. Get the facts first! Guesswork has wrecked many businesses and many otherwise successful careers. Take time to get the pertinent facts about problems; hear both sides of every issue with an open mind; avoid snap judgments; ask for advice if you are not sure.

K. Complete a task.

1. Each day think more about what you have accomplished than about what remains to be done. Enjoy the satisfaction derived from completing work or reaching a goal.

2. Deliberately plan stopping places and measure your accomplishment in terms of the segments you have completed.

3. When you stay with a task until it is finished, you decrease the risk of forgetting a part of the task. If you must put work aside unfinished, make detailed notes on what remains to be done.

4. If you have numerous demands on your time, you may discover that you have many tasks started with none finished. If possible, do not start another one but use your time to complete the ones you have started.

L. Cope with interruptions.

1. Anticipate interruptions and allow time for them in your planning. Keep calm and do not allow yourself to become rattled by them.

2. Give adequate time to handling each interruption. Do not appear to be rushed, but do not waste time because of an interruption.

   a. Mark your place as soon as you are interrupted.

   b. Once you are interrupted, complete what the interruption is about if it can be handled in a few minutes. Remember that every time you must postpone following through on a request, you are actually handling two interruptions instead of one.

    c. Quickly resume work where you left off at the time of the interruption. Do not encourage co-workers to linger in your office. Be courteous, but do not continue a telephone conversation beyond the time necessary to actually handle the call.

3. Do not create your own frustrations by planning to accomplish more than you can reasonably do.

4. When you discover that you are running out of time to meet a deadline, decide what work can be postponed. Use your time for a priority item.

5. When you must interrupt others, be considerate. Wait until the other person is at a break in his/her work. Direct your questions to the right person without interrupting others unnecessarily. Do not ask others to answer questions which you can answer by looking them up. Accumulate the questions you must ask your supervisor and ask several at one time to minimize interrupting him/her.

M. Make a daily plan. (AS 1, AS 2)

1. At the end of the day, review the work you must do the following day. Go through the same steps daily and leave your office with the satisfaction that your work is well organized for the following day.

    a. Review the items in your tickler file. (It reminds the user of tasks as they become current.)

    b. Synchronize appointment calendars.

    c. Review your "To Do" list.

    d. List your supervisor's activities for the following day. Include all appointments, showing with whom, the purpose, the time, and location. Add reminders of work your supervisor must complete during the day.

    e. Locate the reports, correspondence, and other items your supervisor will need during conferences, before placing telephone calls, writing reports, or carrying out other responsibilities. Flag these with colored stickers or attachable signals so that you can retrieve them quickly the following day. Likewise, locate the information you will need to proceed with your own work.

    f. Replenish your supervisor's office supplies.

    g. Complete your filing and lock the files.

    h. Clear your desk, putting everything in place.

2. The next morning:

   a. Review the entries in your daily appointment calendar and "To Do" list.

   b. Place your supervisor's list of activities on his/her desk.

   c. Remove the current materials from your tickler file; review tickler cards.

N. Position materials and tools within easy reach.

1. Place the equipment, supplies, reference materials, and tools you need in the normal working area before you begin the task.

2. Eliminate reaching as well as getting up from your desk to get tools, supplies, or information.

3. Use the space in your desk to store supplies, stationery, and work-in-progress. Materials should pass across the top of your desk but should not be stored on it.

4. Form the habit of removing from your desktop all items that you are not using and will not be using momentarily, providing yourself ample working space and giving your office a neat, orderly appearance. You will want to make a good impression on callers, and you can concentrate best when you work in an uncluttered area.

5. Make a filing system for current projects in your desk. Label and organize the files for easy access. Periodically review all desk files and keep only the current essential ones in your desk. (Over 90 percent of all files more than one year old are never referenced.)

6. Utilize the input-output system to process information. Maintain two large stacking file baskets--one to contain work coming to you and one for work which you have processed which is now ready to send on. Pending items may be stored in a desk drawer in a monitored tickler system.

O. Ask yourself frequently: What is the best use of my time right now? DO IT!

IV. Electronic Aids to Time Management

A. Software has been specifically developed to aid in managing time. Time Manager, for example, is an electronic calendar which includes functions for scheduling appointments; making permanent entries (such as holidays or tax deadlines);

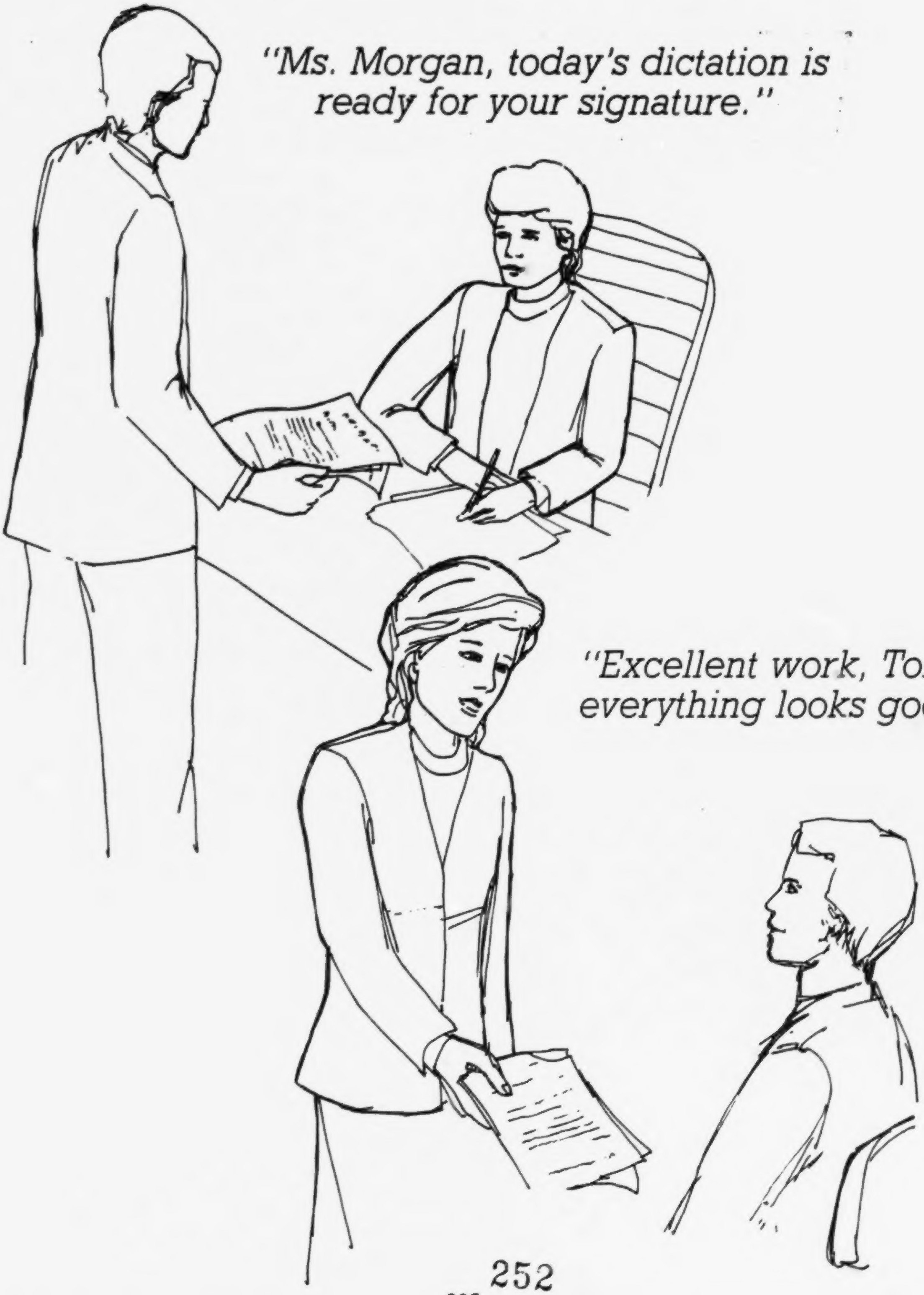
maintaining an ongoing and/or prioritized "To Do" list; allocating expenses and/or time for billing, reimbursement, or taxes; and utilizing electronic notepads for telephone numbers, addresses, or other information.

B. Integrated function software may also contain electronic calendar capabilities. By using the keyword function of VisiDex, for example, its electronic calendar capabilities may be expanded and, consequently, more useful.

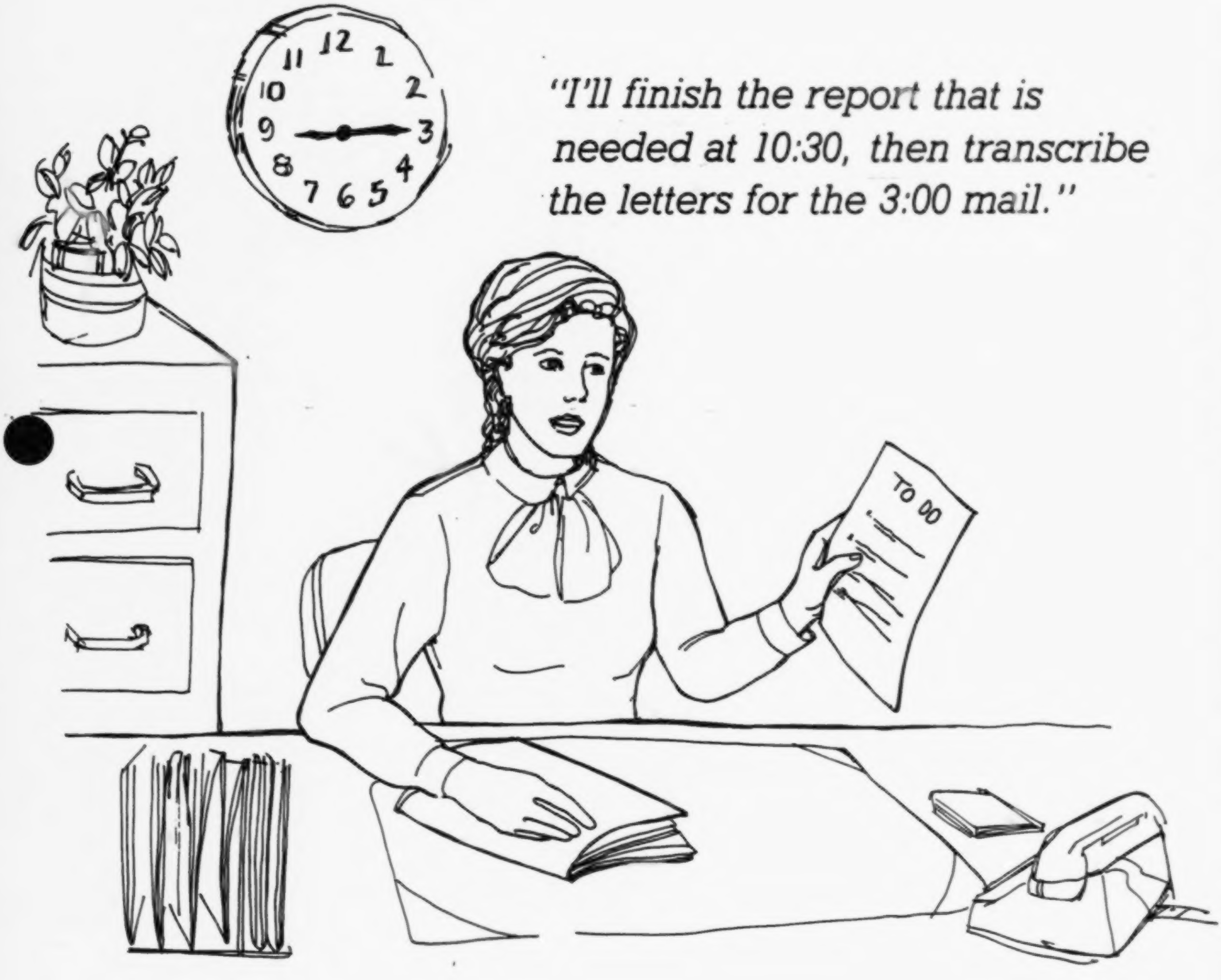
C. Executive scheduling may be a component of corporate computer systems. Each user's schedule and appointments are maintained individually on the system. To schedule a meeting for Executives A, B, C, and D, the computer will access each individual's schedule to find the first commonly accepted time. This prevents numerous phone calls, memos, and postponements due to schedule conflicts.

TM 1

Efficiency: Doing the Job Right


"Ms. Morgan, today's dictation is ready for your signature."
"Excellent work, Tom, everything looks good."

Effectiveness:
Doing the Right Job


12
1
2
3
4
5
6
7
8
9
10
11
TO DO

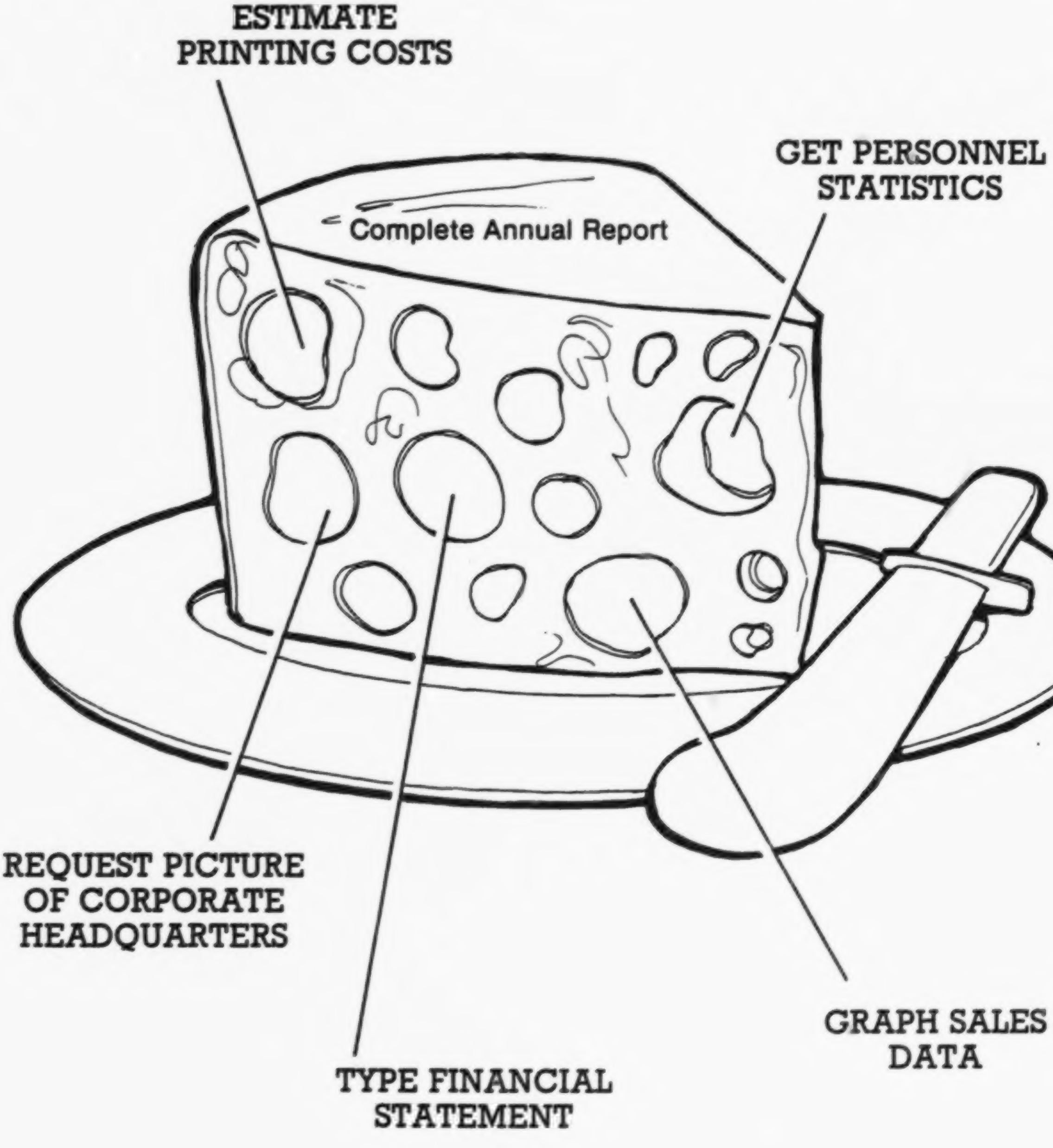
"I'll finish the report that is needed at 10:30, then transcribe the letters for the 3:00 mail."

Time Equals Money

If your hourly rate is:	Each minute is worth:	In one year (244 working days), one hour per day is worth:
$3.00	$.05	$732.00
3.35	.0558	817.00
3.50	.0583	854.00
3.75	.0625	915.00
4.00	.0667	976.00
4.25	.0708	1,037.00
4.50	.075	1,098.00
4.75	.0792	1,159.00
5.00	.0833	1,220.00
5.25	.0875	1,281.00
5.50	.0917	1.320.00
5.75	.0958	1,403.00
6.00	.10	1,464.00

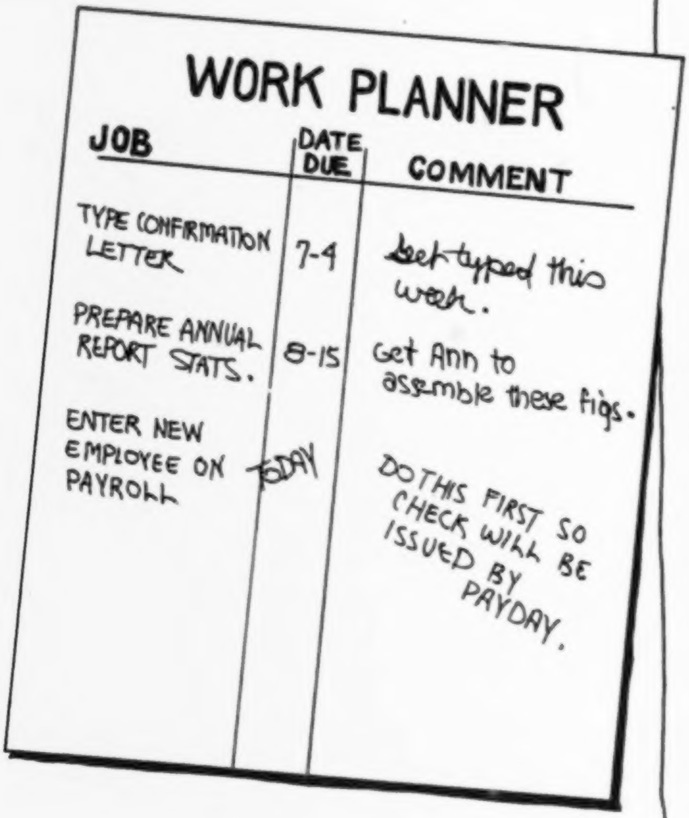
Annual Report Preparation

The "Swiss Cheese" Approach


ESTIMATE PRINTING COSTS
GET PERSONNEL STATISTICS
Complete Annual Report
REQUEST PICTURE OF CORPORATE HEADQUARTERS
GRAPH SALES DATA
TYPE FINANCIAL STATEMENT

TM 5

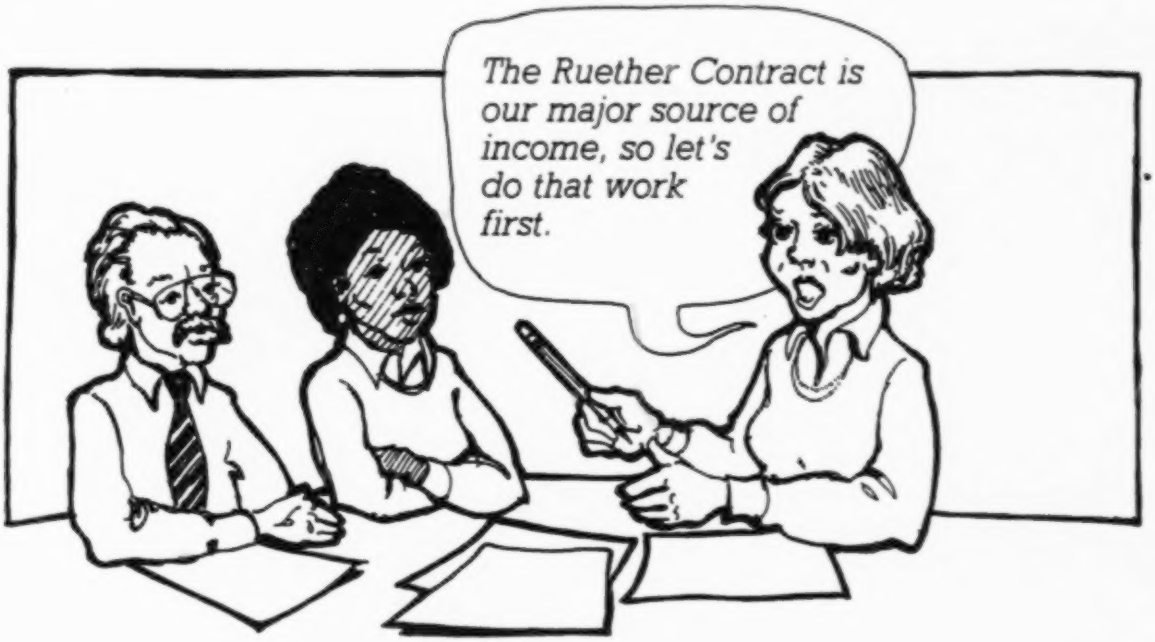
Planning Work



WORK PLANNER

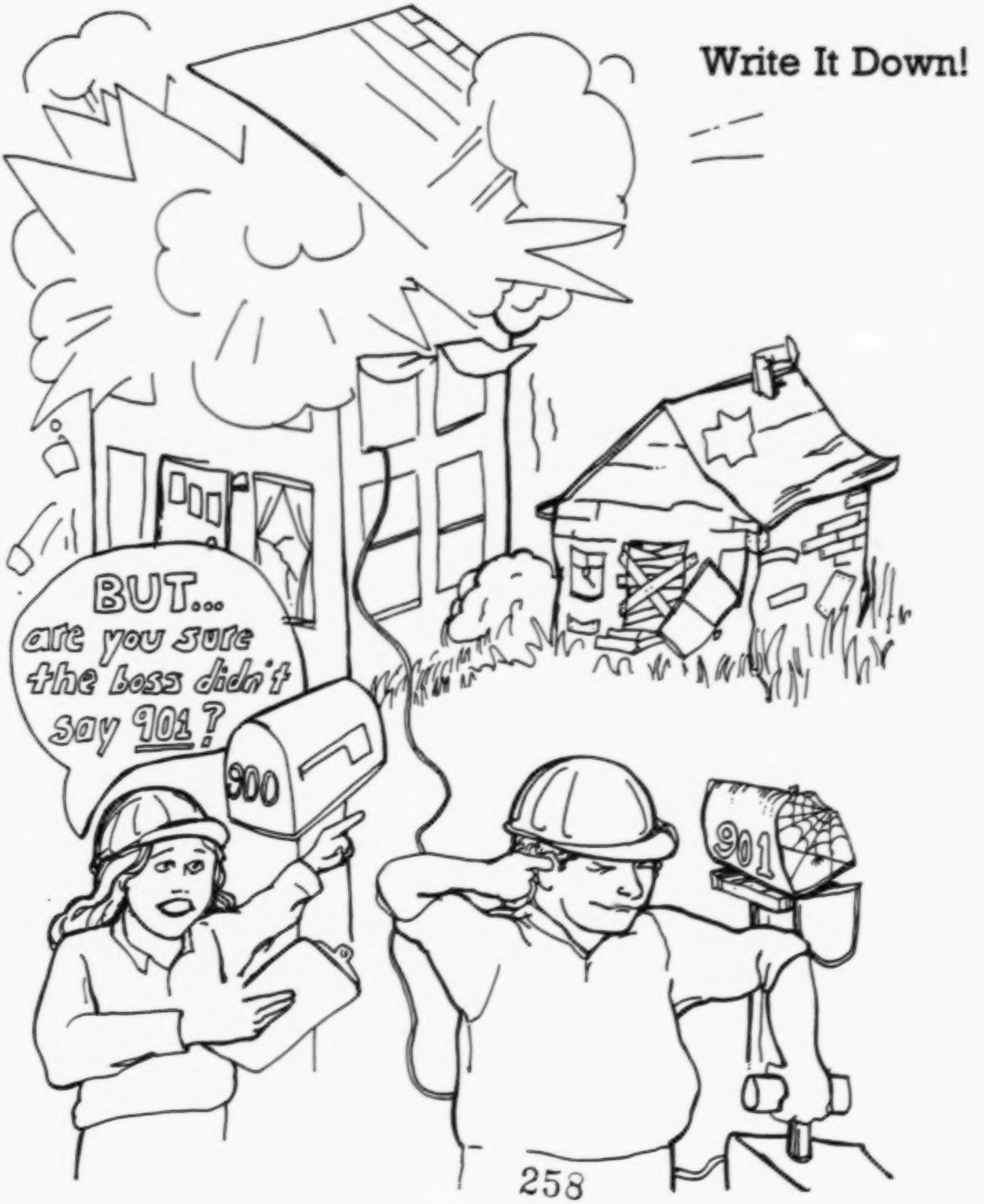
JOB	DATE DUE	COMMENT
TYPE CONFIRMATION LETTER	7-4	Get typed this week.
PREPARE ANNUAL REPORT STATS.	8-15	Get Ann to assemble these figs.
ENTER NEW EMPLOYEE ON PAYROLL	TODAY	DO THIS FIRST SO CHECK WILL BE ISSUED BY PAYDAY.

- Make a "To Do" list.
- Plan your work.
- Follow your plan.
- Be flexible.


The Ruether Contract is our major source of income, so let's do that work first.

Number 1 Importance = Number 1 Priority

Learn To
Follow Directions


Write It Down!
BUT...
are you sure
the boss didn't
say 901?
900
901

258

ASSIGNMENT SHEET 1: Planning Your Activities

DIRECTIONS: Develop a "To Do" list for your own activities. Include school activities and assignments, social activities, and home responsibilities. Prioritize each entry and block time whenever possible. As you complete an item, line through it. Hand in the "To Do" list for each day at the next class session.

ASSIGNMENT SHEET 2: Preparing a "To Do" List and Daily Plans

DIRECTIONS: Prepare a "To Do" list and daily plans for the week. Show 15-minute intervals on the daily plans (see Sample Daily Plan on the next page). Your work hours are 8:30 a.m.-12:15 p.m., 1:30-5:15 p.m.

(Upon arriving at your desk for your first day of work as a data entry clerk, you found these notes.)

1. I'll be here to talk with you Monday at 10 a.m. after the weekly department manager's meeting. Jean Adams

2. Don't forget our departmental staff meeting Thursday at 8:30 a.m.

3. Welcome to our company! Come to the third floor conference room (just across from the elevators) Monday at 2 p.m. for orientation and an official welcome. We're glad you're here! Heather, Employee Relations

4. The heating/air conditioning vent near your desk isn't working. You should call Terry in maintenance after noon Monday to check it.

5. If you'd like to join a company bowling league, see John in Employee Relations on Wednesday for information.

6. Your terminal has been malfunctioning. The service representative should be here early Tuesday morning.

7. This stack has not been entered into the system. Sorry! RV

8. These sales can't be entered because critical details are missing. You'll need to return them to the Sales Department for corrections. Note that three of them are RUSH orders. RV

9. Your physical with the company doctor, Dr. Zahn, has been scheduled for 9:30 a.m. on Friday in the Health Center on the 2nd Floor. Heather, Employee Relations

10. Your supervisor said for you to schedule two 15-minute breaks between 9-11 a.m. and 2-3:30 p.m.

11. In reading the procedures manual you find this information:

Data entry priorities:	rush items
	ASAP sales
	routine purchase orders
	credit memos
	customer payments
	routine sales

12. Data batches are delivered to the department at 9:30 a.m., 11 a.m., 1:15 p.m., and 3:30 p.m. The order status report runs at 4:30 p.m.; the sales status report runs at 9 a.m.

13. Departmental mail dispatches are at 12 noon and 5:15 p.m.

14. Print mail-out documents at 11 a.m. and 4 p.m. to be ready for 12 noon and 5:15 p.m. mail dispatches.

SAMPLE DAILY PLAN

MONDAY

8:15	
8:30	
8:45	
9:00	Sales status report runs
9:15	
9:30	Data batch delivery

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet 1

I. Evaluate:

1. Comprehensiveness of entries

2. Judgment in prioritizing

3. Adequate detail given for decision-making purposes

4. Accomplishment of priorities

II. Maintain the hand-in procedure for at least two weeks. At end, ask students to evaluate their own time utilization--has it improved? Are they more aware of time as a resource?

III. Concept: Spending time with friends talking and relaxing is not wasting time if it is consciously designated as relaxation time. It is wasted if a high-priority item remains undone at the expense of merely "being with" friends.

Assignment Sheet 2

"To Do" List

1. Prepare daily plans for week

2. Schedule 15-minute breaks

3. Read company/departmental procedures manual

4. Return "leftover" sales documents to the Sales Department for corrections--three items are labeled RUSH

5. Data entry:

    a. Rush items
    b. ASAP sales
    c. Routine purchase orders
    d. Credit memos
    e. Customer payments
    f. Routine sales

MONDAY

8:15	
8:30	
8:45	
9:00	Sales status report runs
9:15	
9:30	Data batch delivery
9:45	
10:00	Jean Adams, Dept. Mgr. here to talk with me
10:15	
10:30	
10:45	
11:00	Print mail-out documents/data batch delivery
11:15	
11:30	
11:45	
12:00	Departmental mail dispatch/call Terry in maintenance to check heating/air conditioning vent near my desk
12:15	
12:30	LUNCH
12:45	
1:00	
1:15	Data batch delivery
1:30	
1:45	
2:00	Orientation meeting--third floor conference room
2:15	
2:30	
2:45	
3:00	
3:15	
3:30	Data batch delivery
3:45	
4:00	Print mail-out documents
4:15	
4:30	Order status report runs
4:45	
5:00	
5:15	Departmental mail dispatch

A 15-minute break should be scheduled between 9-11 and between 2-3:30.

TUESDAY

8:15	Service rep for CRT to be here early this morning
8:30	
8:45	
9:00	Sales status report runs
9:15	
9:30	Data batch delivery
9:45	
10:00	
10:15	
10:30	
10:45	
11:00	Print mail-out documents/data batch delivery
11:15	
11:30	
11:45	
12:00	Departmental mail dispatch
12:15	
12:30	LUNCH
12:45	
1:00	
1:15	Data batch delivery
1:30	
1:45	
2:00	
2:15	
2:30	
2:45	
3:00	
3:15	
3:30	Data batch delivery
3:45	
4:00	Print mail-out documents
4:15	
4:30	Order status report runs
4:45	
5:00	
5:15	Departmental mail dispatch

A 15-minute break should be scheduled between 9-11 and between 2-3:30.

WEDNESDAY

8:15	See John in Employee Relations about company bowling league today
8:30	
8:45	
9:00	Sales status report runs
9:15	
9:30	Data batch delivery
9:45	
10:00	
10:15	
10:30	
10:45	
11:00	Print mail-out documents/data batch delivery
11:15	
11:30	
11:45	
12:00	Departmental mail dispatch
12:15	
12:30	LUNCH
12:45	
1:00	
1:15	Data batch delivery
1:30	
1:45	
2:00	
2:15	
2:30	
2:45	
3:00	
3:15	
3:30	Data batch delivery
3:45	
4:00	Print mail-out documents
4:15	
4:30	Order status report runs
4:45	
5:00	
5:15	Departmental mail dispatch

A 15-minute break should be scheduled between 9-11 and between 2-3:30.

THURSDAY

8:15	
8:30	Departmental staff meeting
8:45	
9:00	Sales status report runs
9:15	
9:30	Data batch delivery
9:45	
10:00	
10:15	
10:30	
10:45	
11:00	Print mail-out documents/data batch delivery
11:15	
11:30	
11:45	
12:00	Departmental mail dispatch
12:15	
12:30	LUNCH
12:45	
1:00	
1:15	Data batch delivery
1:30	
1:45	
2:00	
2:15	
2:30	
2:45	
3:00	
3:15	
3:30	Data batch delivery
3:45	
4:00	Print mail-out documents
4:15	
4:30	Order status report runs
4:45	
5:00	
5:15	Departmental mail dispatch

A 15-minute break should be scheduled between 9-11 and between 2-3:30.

FRIDAY

8:15	
8:30	
8:45	
9:00	Sales status report runs
9:15	
9:30	Data batch delivery Company physical with Dr. Zahn, Health Center, 2nd floor
9:45	
10:00	
10:15	
10:30	
10:45	
11:00	Print mail-out documents/data batch delivery
11:15	
11:30	
11:45	
12:00	Departmental mail dispatch
12:15	
12:30	LUNCH
12:45	
1:00	
1:15	Data batch delivery
1:30	
1:45	
2:00	
2:15	
2:30	
2:45	
3:00	
3:15	
3:30	Data batch delivery
3:45	
4:00	Print mail-out documents
4:15	
4:30	Order status report runs
4:45	
5:00	
5:15	Departmental mail dispatch

A 15-minute break should be scheduled between 9-11 and between 2-3:30.

POSTTEST

I. Multiple Choice: Circle the letter of the best answer.

1. Effective time management involves scheduling:

   a. 25 percent of your time
   b. 33 percent of your time
   c. 50 percent of your time
   d. 66 percent of your time
   e. 75 percent of your time

2. A worker's individual task schedule is controlled by

   a. his/her own work pattern
   b. his/her supervisor's preferences
   c. the company information flow
   d. all of the above
   e. none of the above

3. In scheduling a new task, estimate the time required and

   a. block out that amount of time
   b. block an amount of time equal to 1.5 times your estimate
   c. block an amount of time double your estimate
   d. don't waste time estimating just work as long as possible

4. Because interruptions cannot be prevented, they should be anticipated by

   a. flexible scheduling
   b. calling in sick on busy days
   c. doing short, easy tasks that will not suffer from interruptions
   d. asking a co-worker to take your phone calls

5. A tickler file

   a. is necessary only for secretaries
   b. works best with recurring tasks
   c. allows the user to concentrate on the tasks as they become current without wasting time
   d. is a waste of time

6. Planning each day's activities is necessary for

   a. all workers
   b. entry-level workers
   c. supervisors
   d. executives
   e. people who have time

II. True/False: In each blank, write TRUE if the statement is true and FALSE if it is false.

__________ 1. The computer can aid in time management.

__________ 2. Only supervisors are responsible for efficiency.

__________ 3. An efficient worker may not be effective.

__________ 4. The most important step in task completion is getting started.

III. Case Study: Read the entire case. Evaluate each entry and determine its priority on the following scale:

Rush Item
ASAP Item
Routine Item

Prioritize each task for best time management. Today is July 28.

CASE:

Your supervisor will return to the office from vacation on July 30. The division manager is on a buying trip in London and will return to the office on the afternoon of August 15. She has left an address in London where you can contact her if necessary.

All finance reports are due three days prior to month-end so that checks can be available on the first working day of the following month. All items to be posted on company grounds must be sent to Employee Relations at least one week prior to intended publication.

Task A: Send a copy of the retirement dinner program to the division manager so that she can prepare her presentation.

Task B: Order flowers for the August 15 retirement dinner.

Task C: Prepare a job description and "request to hire" for the secretarial position to be available on August 15 so that your supervisor may sign the documents and forward them to Personnel.

Task D: Analyze the telephone billing and allocate expenses to departments based upon usage.

Task E: Prepare bid comparison for printing the annual report so that the bid can be awarded. (Fiscal year ends September 30.)

Task F: Prepare your supervisor's August itinerary and request for travel advance.

Task G: Request July production and sales statistics for discussion at the August 3 staff meeting.

Task H: Prepare and distribute copies of the August 3 staff meeting agenda.

Task I: Prepare a working draft of your supervisor's September itinerary.

Task J: Prepare a routine all-staff notice for the August 10 meeting to be posted on the employee bulletin board.

Task K: Make air and hotel reservations for your supervisor's August 20-25 trip to New York.

Task L: Notify department heads that all staff evaluations are to be completed prior to August 15.

POSTTEST KEY

I. 1. c
2. d
3. b
4. a
5. c
6 a

II. 1. TRUE
2. FALSE
3. TRUE
4. TRUE

III. A. Rush
B. Routine
C. ASAP
D. Rush
E. Rush
F. Rush
G. ASAP
H. ASAP
I. Routine
J. ASAP
K. Rush
L. Routine

Unit XII - Personal Development
Lesson 2 - Business Dress

LESSON OBJECTIVE

Given the guidelines for business dress, the student will identify appropriate apparel for the office with 90 percent accuracy within 30 minutes.

SUGGESTED ACTIVITIES

I. Instructor

   A. Prepare transparencies.

   B. Provide objectives and information sheets for students.

   C. Have students complete each Assignment Sheet and then discuss results.

   D. Give posttest.

II. Student

   A. Read and discuss objectives and information sheets.

   B. Complete Assignment Sheets.

   C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Transparency Masters

   A. TM 1: Image
   B. TM 2: Company Image/Employee Image
   C. TM 3: The Perfect Finish or ....
   D. TM 4: The Business "Uniform" for Women
   E. TM 5: The Skirted Suit
   F. TM 6: Blouses for Business
   G. TM 7: The Business Dress
   H. TM 8: The Pantsuit--Acceptable???
   I. TM 9: Accessories
   J. TM 10: The Business "Uniform" for Men
   K. TM 11: Ties
   L. TM 12: Women: The Fit

M. TM 13: Women: The Unfit
N. TM 14: Men: Which One?
O. TM 15: The Right Length for Ties and Trousers

IV. Assignment Sheets and Answers

A. AS 1: Wardrobe Inventory for Women and Wardrobe Inventory for Men
B. AS 2: Choosing a Wardrobe
C. AS 3: Wardrobe Evaluation
D. AS 4: What Would You Buy?

V. Posttest and Key

INFORMATION SHEET

I. Image

A. Corporate image is the mental concept that people develop toward a company through reaction to advertising and reputation, outward appearance, and most often through personal contact with employees. (TM 1)

Each profession has a distinct image or business style. Bankers want to project the image of trustworthiness and stability to encourage people to invest while clothing designers present a new, sometimes surprising image indicating new ideas and the look of tomorrow--not yesterday.

B. Personal image of employees should coincide with corporate image. A company which projects an established, stable image such as a bank will encourage employees to dress more conservatively than the public relations firm whose major accounts are in the entertainment industry. (TM 2)

1. Image is a form of communication. An employee should project a positive image for the employer. If the employee's image does not represent the employer well, the company may lose business before ever having a chance to present the product.

2. In formulating your image, be certain that it is the way you really mean it to be. Your image won't work if you don't feel comfortable with it.

3. By planning your image, you will plan for success in your work. Remember that you will never be promoted to a position that you do not look like you belong in. Dress for where you're going--not where you are now.

4. A successful image exemplifies image integrity--all components (clothing, accessories, hair, makeup, speech, voice, body language, manners) should be consistent with each other and with the business environment. (TM 3)

   Seemingly insignificant details can destroy an otherwise positive image--an overstuffed tan shoulder bag that "goes everywhere" worn by a woman dressed in a tailored suit; an untrimmed mustache worn by a man otherwise impeccably dressed; a well-dressed employee in an affluent company who steps from behind the desk wearing scuffed, overrun shoes.

5. We perform on the job according to our self-image. The positive reactions that we get from others make it all the more likely that we will become what we are trying to be.

II. Business Dress--The way you are treated in this world depends largely upon the way you present yourself. Since 90 percent of your body is covered with clothing, your dress will strongly impact the image that you present.

Clothing is the uniform of affluence and power by which people are judged. The initial impression that is created with the right look is unquestionably influential in business success. Every time you dress, you are making a personal statement: "I'm concerned about my job and want to be successful in my job;" "I'm not really important;" or "I don't care about this job--I'm just working for the paycheck."

A. Because women have had more barriers to success in upper business levels than their male counterparts, dress is undoubtedly more critical to the successful woman. Unfortunately, though, women sometimes encourage their own obstacles in business success through what they wear.

    1. Women are more likely to follow fashion in selecting their business dress than are men. Generally, the reaction to trendy fashion in the business setting is negative and the wearer is seen as an intellectual featherweight.

    2. Too often a woman will allow her image from personal life to carry over into her employment--and it seldom works to her advantage.

        a. The feminine and fragile woman may have a gentle voice, "ladylike" ways, and frilly clothes. Whenever the slightest problem arises, she asks one of the men for advice. The message: "I can't do the important things you smart men can. I need to be protected and cared for."

        b. The sex symbol may wear a lot of makeup and clothing that emphasizes her body. She may emphasize her femininity as if she expects to be taken care of. The message: "I'm interested in (1) myself and (2) men."

        c. The woman who appears not to care about her appearance may be in poor physical condition, move awkwardly, and slump. Even though she may be efficient and talented, her appearance indicates lack of confidence in herself and her ability. The message: "I don't care about how I look." If she doesn't care about her appearance, why should she care about her work?

3. Through the years the look of the successful businessman has been established with the business suit. To achieve a comparable look of success, women too can adopt a business "uniform" which is readily identifiable as a business look. (TM 4)

4. John Molloy, a noted researcher on the impact of clothing in the business setting, did extensive studies to determine the best choices for businesswomen's clothing. These are his findings (ranked from highest in executive impact to lowest):

   a. Skirted suit
   b. Dress or skirt with a blazer
   c. Dress with a matching jacket
   d. Man-tailored pantsuit
   e. Simple dress
   f. Skirt and blouse
   g. Slacks and blouse
   h. Skirt and sweater
   i. Slacks and sweater

5. The skirted suit is one with a tailored blazer and matching skirt that falls just below the knee. (Even though dress hems rise and fall with fashion, the business length for suits varies only slightly.) Suits are best in solid, tweed, or conservative plaid linen-look or wool-look fabrics. (TM 5)

6. Dresses in business wear can enhance the wearer's image. (TM 7) Dresses that are made of any fabric that clings, shines, or makes noise when the wearer moves are not suitable for the office. Dresses can also damage the businesswoman's image if they are too frilly or feminine. Any dress which requires a jacket to cover (such as a summer dress with thin straps and large neckline) is unsuitable for office wear.

7. Pantsuits--man-tailored blazers with matching slacks--may be acceptable in some business settings. The best colors are navy, gray, charcoal, beige, deep maroon, rust, camel, and tan. (TM 8)

8. While clothing covers about 90 percent of the body and forms the basis for the image presented, the remaining 10 percent can finish or destroy an otherwise positive image. For a sharp professional business image, remember that accessories should complement and not dominate the total look. When selecting accessories, avoid the trendy ones and concentrate on simple classics. Select accessories that complement your clothing to make a positive statement about you. (TM 9)

   a. Shoes are probably the most necessary and among the most expensive accessory items in a wardrobe. They should be purchased for quality rather than quantity--a quality pair of shoes in a basic color can be worn daily.

b. Jewelry is a common accessory item. For jewelry in business, the rule of moderation applies. It should be simple, functional, attractive, and high-quality.

   1) Since being time-conscious is critical to a businesswoman, a watch may be especially important. It should be small and simple.

   2) A wedding ring is always appropriate. Other rings worn in business should lie flat against the hand.

   3) A woman whose ears are pierced should always wear earrings. Simple gold posts or small hoops are best. Dangling earrings should never be worn for business!

   4) Any jewelry that clangs, bangs, or jangles should be avoided. Jewelry that looks even slightly tarnished or decomposed gives the wearer an overall "dirty" appearance.

c. Women who are seen in the business environment while carrying their handbags should remember that handbags fall into one of two general categories:

   1) The "mommy" bag which is typically oversized and overstuffed but guaranteed to contain just what the woman may need for any occasion. It hangs off her shoulder and drags her down--in image if not also physically!

   2) The sleek, clean bag with little or no ornamentation is obviously the preferable bag for business. The most appropriate ones for business are the clutch, the envelope, and the satchel, each in high quality leather.

d. Makeup can be the positive finish to a businesswoman's appearance as it complements a woman's natural attractiveness. Makeup is not a mask. The more professionally makeup is applied, the more subtle it looks. People should tell you how nice you look--not how beautiful your makeup is.

B. Tradition has established the business suit as the "uniform" for men. Men may wear the "uniform" or utilize an adaptation of it in reinforcing their own images through clothing. (TM 10)

1. A well-fitted, traditionally styled suit will provide the foundation for developing a man's business image.

2. In completing the business look, remember this general guideline: select a shirt that is lighter than your suit and a tie darker than your shirt.

    a. Solid color shirts in white or pastel cotton blends are best. For variety, you may choose a thin pinstripe, business box or business plaid.

        1) The most basic fabric is broadcloth--cotton with a smooth crisp finish. In solid color shirts, you may also see end-on-end weaves or oxford cloth. Both interweave white threads with the basic shirt color.

        2) A basic shirt wardrobe could include a white broadcloth, white oxford cloth, pale blue broadcloth, blue end-on-end weave, blue oxford cloth, beige broadcloth, pale yellow broadcloth, and an assortment of stripes, business plaids or business box styles to coordinate with your suits and slacks.

    b. Men's ties have long been a symbol of status. One researcher positioned a man trying to borrow 75 cents for fare home in a New York City bus station. While wearing a tie, he received $26.00 in an hour; without a tie, he panhandled only $7.23!

        1) Solid color ties coordinate with many suits or shirts and are always appropriate for business. A tie with small polka dots in a fabric with high sheen looks elegant and is appropriate for business.

        2) Many businessmen select club ties, ties with a small repeating pattern or insignia on a dark background. The rep or regimental tie is one with diagonally striped lines of neat, clean, coordinating colors. A foulard is imprinted with a very small geometric design. (TM 11)

    c. Details can either complete or destroy a man's total positive look. Socks should be either black or a choice of black, dark brown, navy or dark gray to coordinate with slacks and shoes.

    d. Shoes for business must be clean and shined in a basic black or brown leather. You may choose either traditional ties or slip-ons with little or no ornamentation.

e. The appropriate belt for business is black or brown to coordinate with the suit or slacks with a plain gold or brass buckle.

f. A ring, watch, and cuff links are always acceptable if conservative.

C. Clothing for business must be clean, pressed, and mended. Wrinkled clothing will destroy an otherwise positive impression. For positive impact, clothing must show quality and good fit.

1. Certain aspects of quality are apparent even without knowing about fabrics and construction.

2. Strong patterns such as plaids or stripes should match at the seams.

3. The colors in separates produced by the same manufacturer and intended to be worn together should match exactly.

4. Seams should be straight and lie flat, especially where they are highly visible (such as in lapels).

5. Any garments that may be worn open as well as closed--jackets, blouse collars, etc.--should be nicely finished on the inside.

6. Trim on a garment should add to its appearance rather than detract from it. Cheap buttons cheapen the appearance but not necessarily the price tag. Avoid flaps without pockets.

7. The quality look of any garment is destroyed if it does not fit properly. The most common fit error is attempting to wear anything too tight. When shopping for clothing, refer to the following guidelines: (TM 12, TM 13, TM 14)

a. Jackets, blazers, sport coats

1) Be sure that the collar and lapels lie flat without rolls or bulk. The fabric should be well-pressed before and after the "crush test." (Squeeze a sleeve in one hand. Does it fall out unwrinkled when released?)

2) When you raise or swing your arms, are the armholes large enough and does the back have enough material to allow freedom of movement? When you look at the jacket in the mirror, does it hang properly or does excess fabric cause a fold?

3) Are the sleeves the right length? Sleeves should usually reach to about five inches from the thumb tip.

4) When the jacket is buttoned, does it just touch rather than bind the body? Is the lining in a coordinated color? (A bright yellow lining in a navy jacket is not good!)

5) Does the length of the jacket on your body give a balanced appearance that looks "right?"

b. Skirts--check the waistband fit. A band that is too tight will fold over and cause bulges above and below the beltline. Examine the skirt for adequate seam and hem allowances. Avoid a skirt that is too short; even if it can be lengthened, the original hemline is likely to show.

c. Slacks

1) Try on slacks with a blouse/shirt to get an accurate idea of fit and appearance. If the blouse/shirt line shows, the slacks are too tight. A waistband that is too tight will fold over and look sloppy.

2) Does the back have adequate material to allow freedom of movement in sitting, standing, and bending? Does the crotch fit smoothly without being too tight or too baggy?

3) Does the length allow the slacks to lightly touch the shoe without wrinkling? (TM 15)

d. Blouses, shirts

1) For a crisp, fresh look, washable cotton blends will give the feel of cotton and the wrinkle-free quality of polyester. One hundred percent polyester, Qiana, and Arnel may provide alternatives. One hundred percent cotton wrinkles easily and silk is difficult to wash and iron properly.

2) Check the workmanship. Are buttons secured firmly and buttonholes reinforced? Are the seams smooth and well stitched? Does the garment cut allow freedom of movement without binding or bagging? The cuffs should button comfortably at the wrist.

3) The collar size of men's shirts is measured around the neck, starting at the Adam's apple. Shirt sleeves are measured from the bone at the base of the neck to the wrist.

e. Dresses

1) To see actual fit and correct length, wear the appropriate undergarments and shoes when you try on dresses. Be sure that the neckline lies flat and smooth.

2) Note how the seams fit your body. The shoulder seam should fall at the end of the shoulder and the bodice darts should end at the fullest part of the bust. The waistline should rest correctly on your figure. The zipper should be sewn in smoothly and be of good quality.

f. Shoes

1) Since the foot may expand up to one full size during the day, the best time for shoe shopping is late afternoon. While walking around on the store's carpet, does the heel slip away from your foot? Are your toes comfortable when you wiggle them?

2) A leather shoe may initially feel a bit tight but will conform to your foot after a few wearings. An imitation leather or vinyl shoe may never conform, however, but could cause calluses or bunions as your feet conform to the shoe.

3) Because leather is long-wearing, looks stylish, and allows the foot to breathe, it is generally the best material for shoes.

D. A wardrobe should be developed around the activities of the wearer with the proportion of clothing for each activity relative to the amount of time spent in that activity.

E. The climate, geography, and your occupation will combine with budget and common sense to determine the most effective working wardrobe for each person.

III. Appropriate Grooming for Business To Complete the Business Image.

A. Your hairstyle should complement the remainder of your business look. A good professional cut is the basis for good-looking hair for both men and women. Even good haircuts must be trimmed to maintain shape. Well-groomed hair looks shiny clean, never greasy or stiff.

B. Hands and fingernails are almost always on display and, therefore, cannot be overlooked in considering image. Fingernails should be trimmed (not chewed!) and shaped. They should look smooth, shiny and healthy. Hands should be clean and smooth. A cleanser and nail brush will help in cleanup after especially dirty jobs. Hand lotion is especially beneficial in fall and winter when skin tends to be dry and irritated.

C. Clean, well-cared for teeth will complement your appearance. Teeth should be brushed at least twice a day. For those times when brushing is impossible, you might use mouthwash or breath mints.

D. Take a bath or shower at least once a day, and use deodorant or antiperspirant daily.

E. A person who eats a well-balanced diet, exercises regularly, and gets enough sleep will be more attractive, as well as a more efficient worker.

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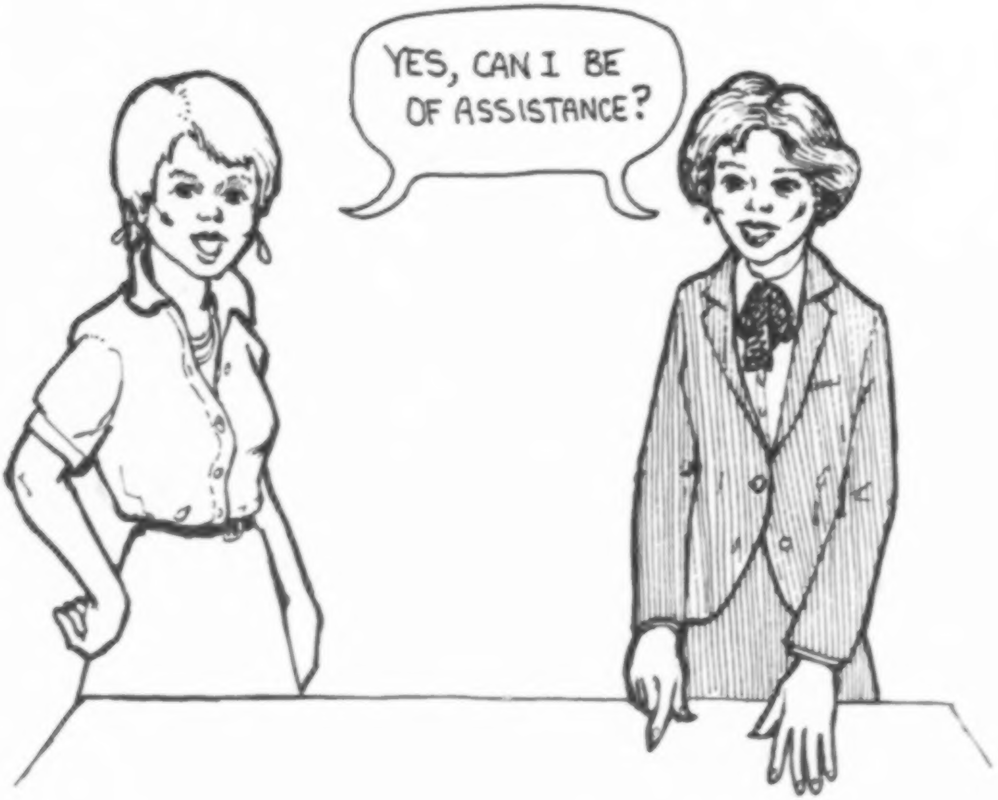
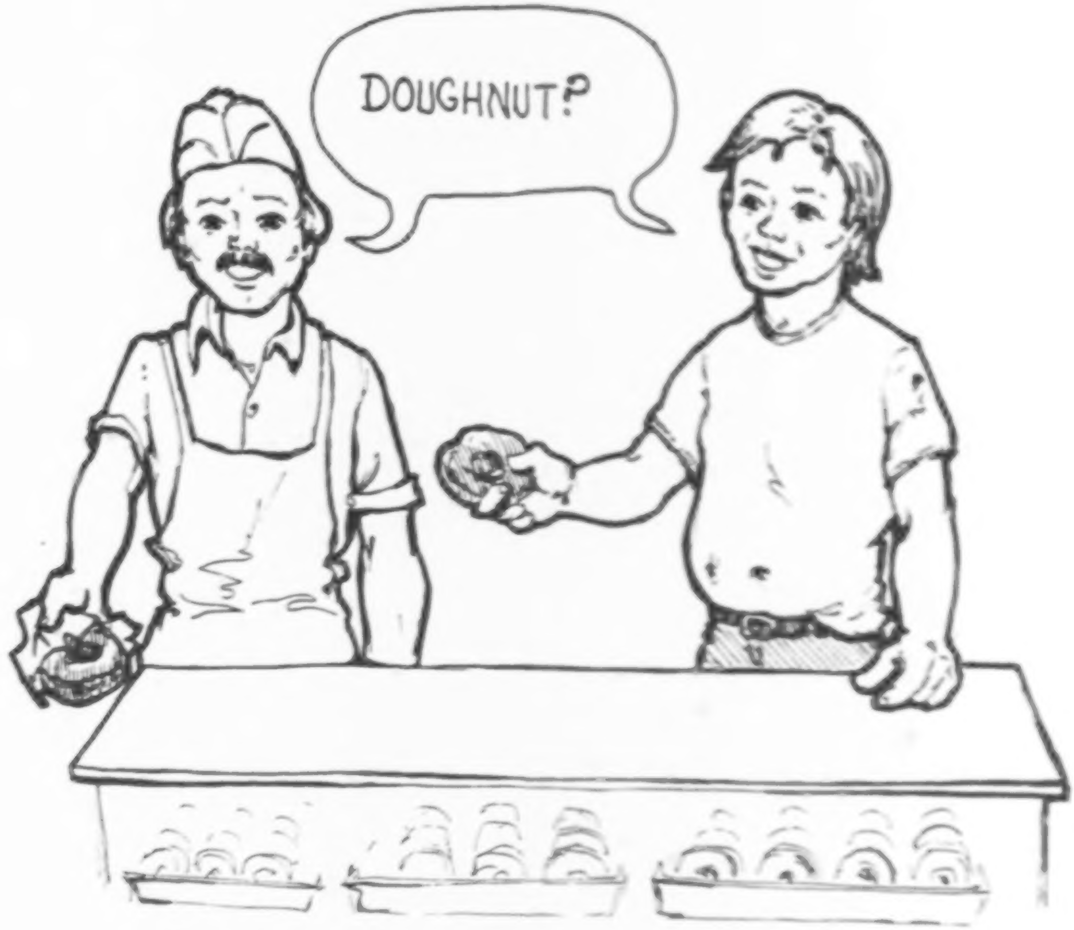
Image

What kind of image does dress project?


YES, CAN I BE OF ASSISTANCE?

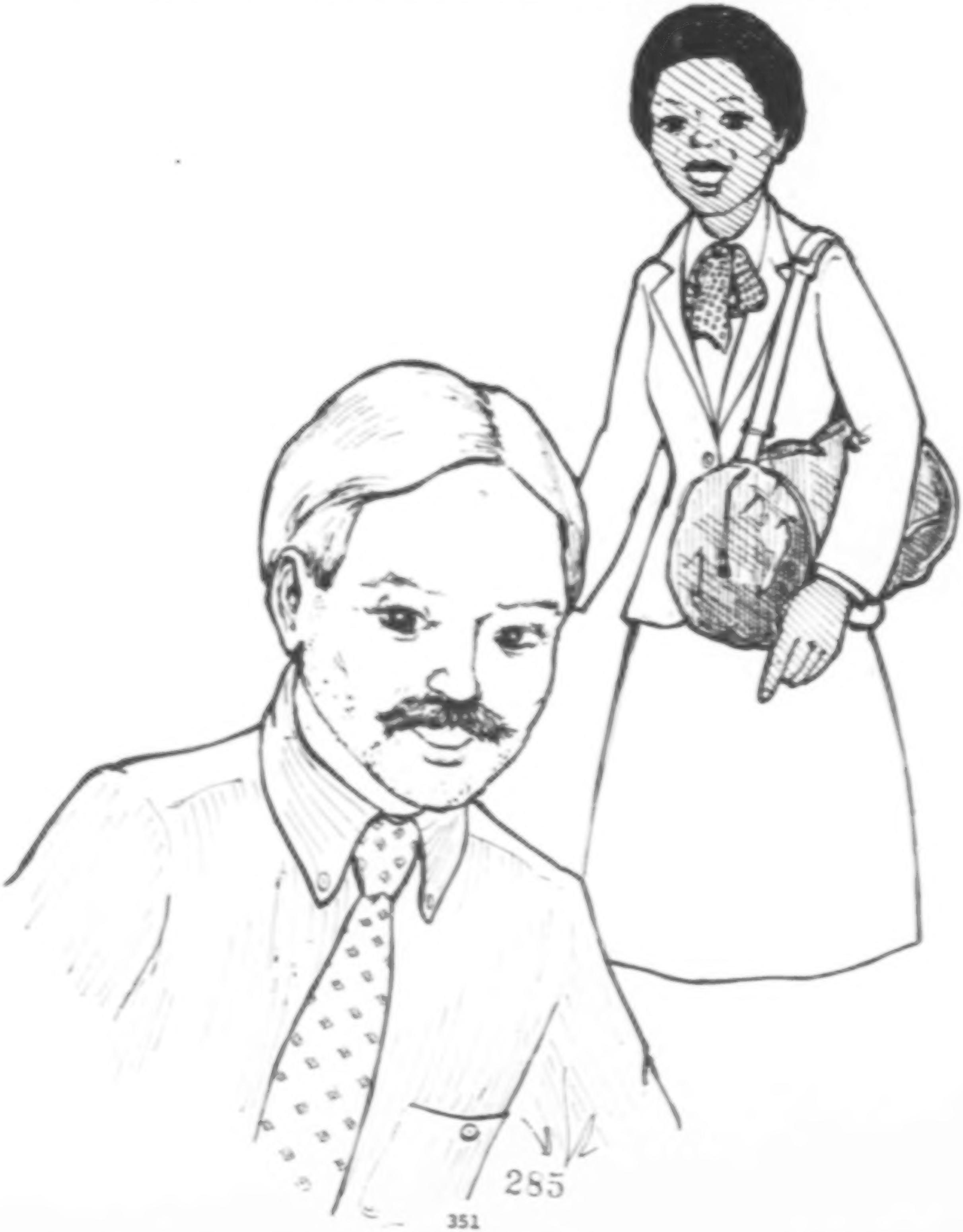
Company Image/Employee Image

Employees should project the image of their employer.

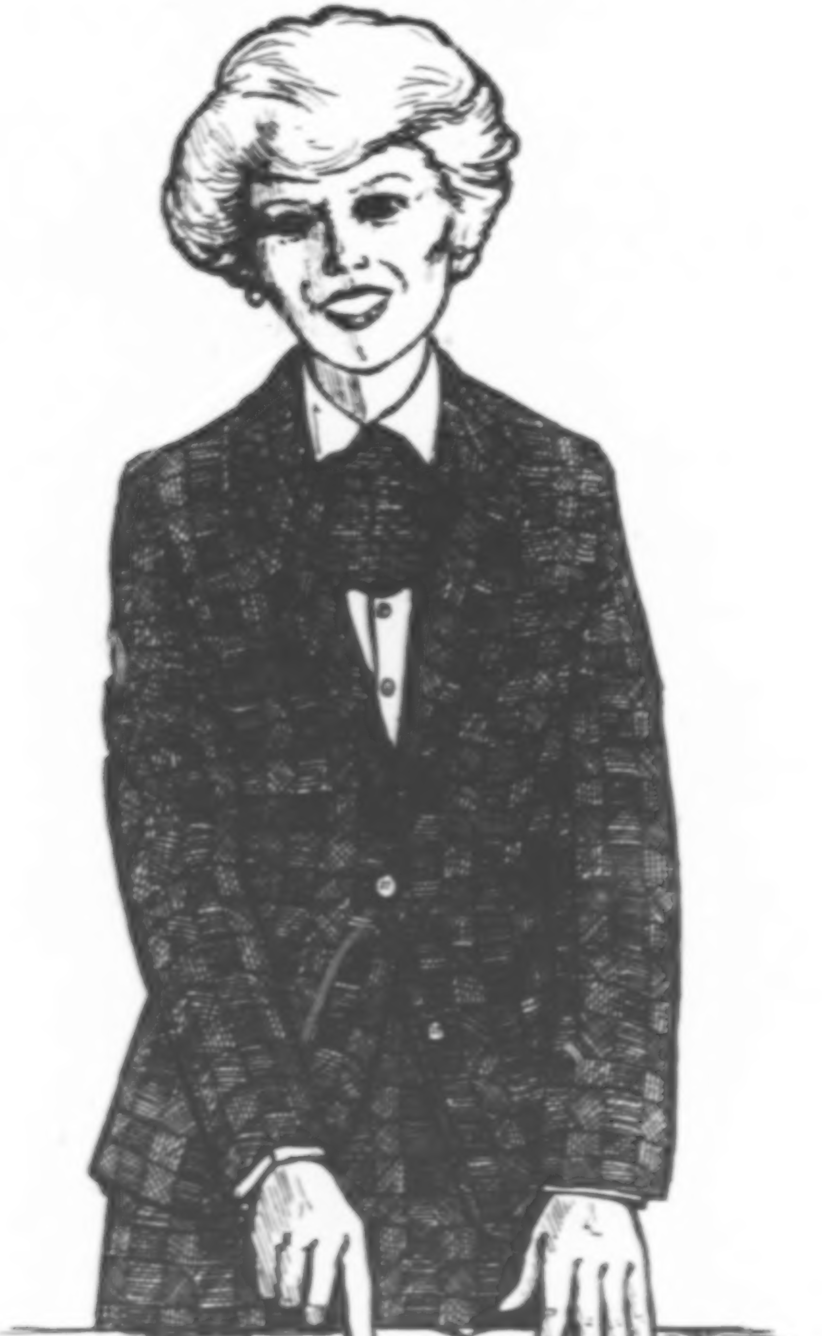


The Perfect Finish or. . .

Details can destroy an otherwise positive image.

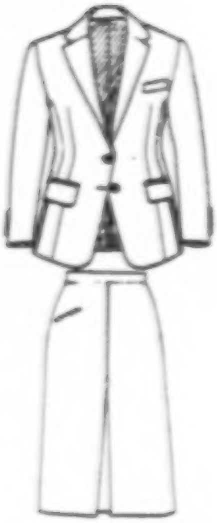


The Business "Uniform" for Women



TM 5

The Skirted Suit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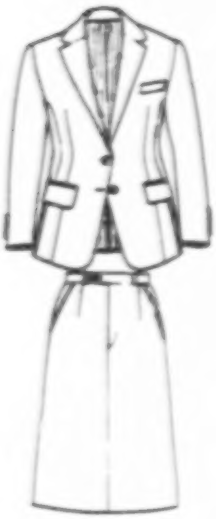
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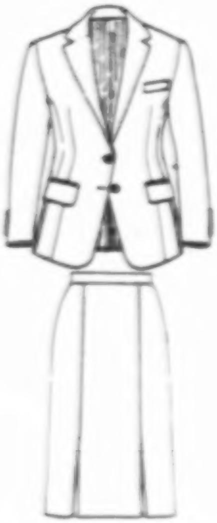
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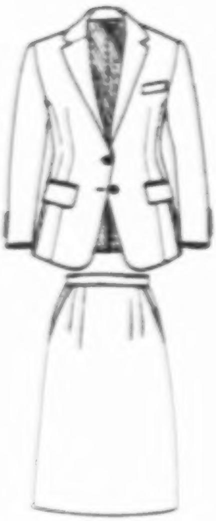
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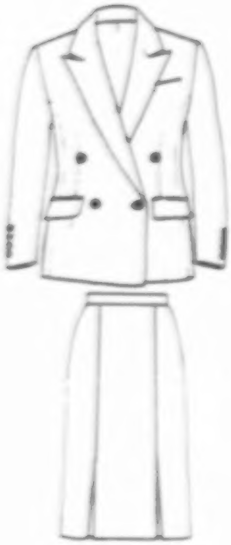
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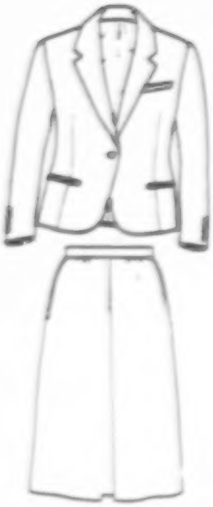
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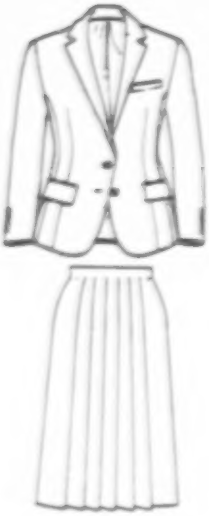
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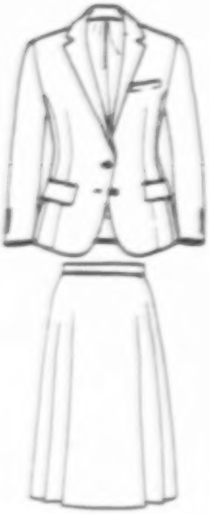
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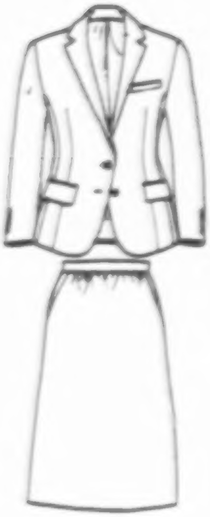
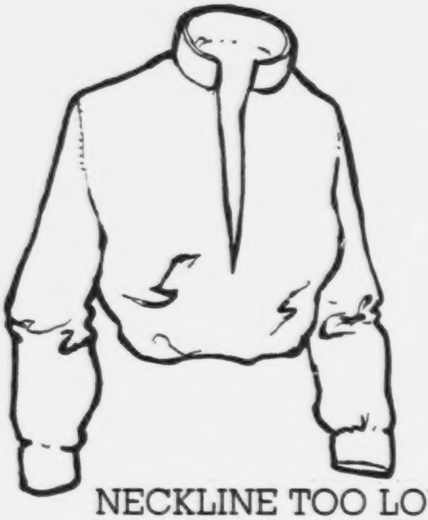
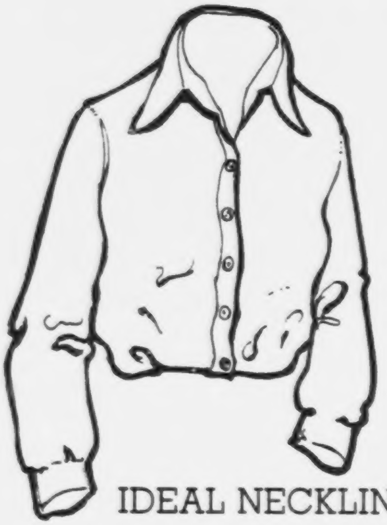

CARLISLE

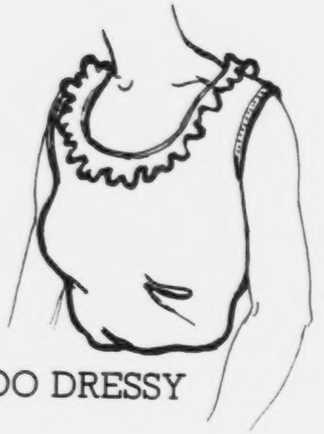
Blouses for Business



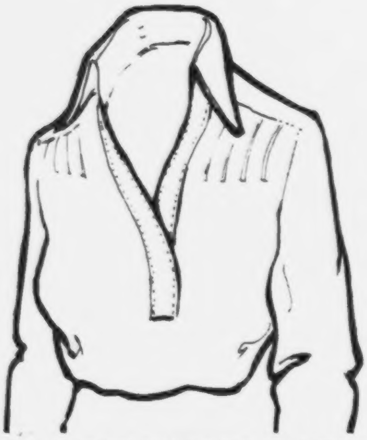
NECKLINE TOO LOW



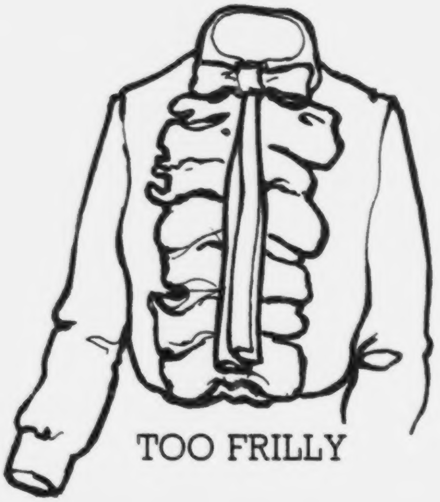
IDEAL NECKLINE



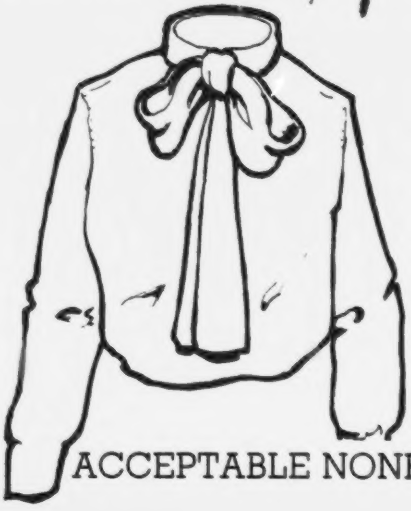
TOO DRESSY



LOWEST ACCEPTABLE NECKLINE



TOO FRILLY

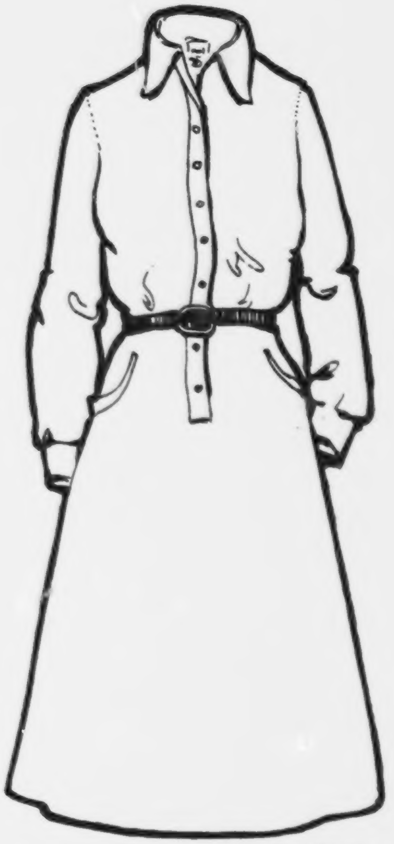


ACCEPTABLE NONFRILLY

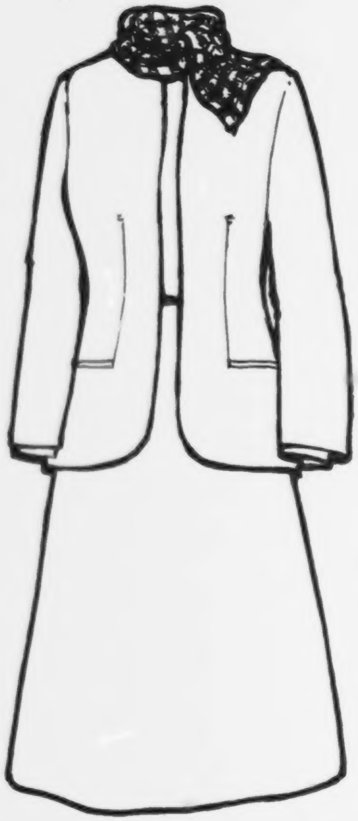
TM 7

The Business Dress

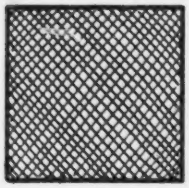
Two dress styles that test well.



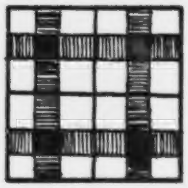
SIMPLE SHIRTWAIST



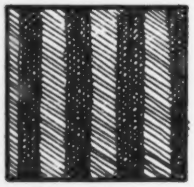
MATCHING DRESS AND JACKET



SOLID

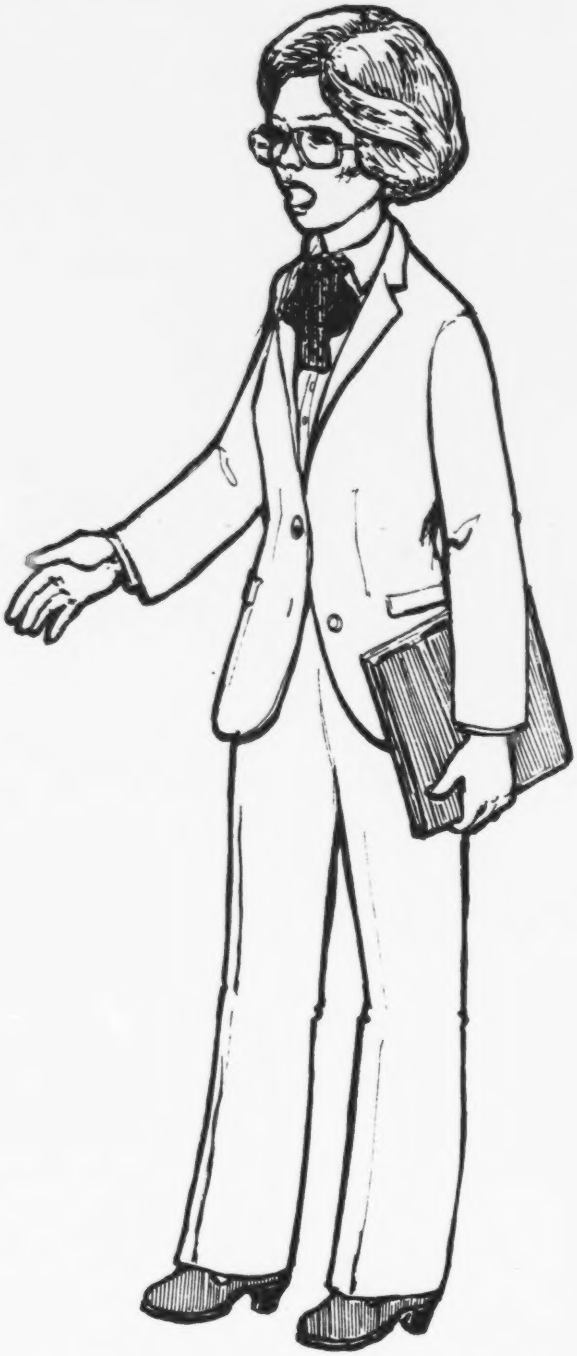


PLAID



STRIPE

The Pantsuit - Acceptable???



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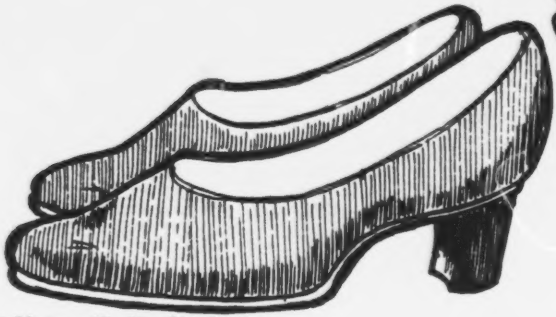
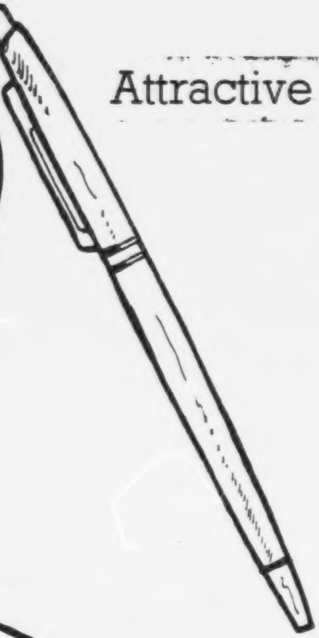
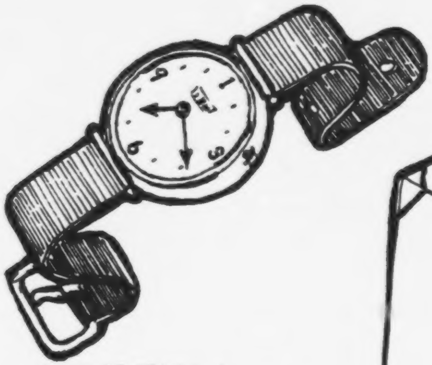
Accessories



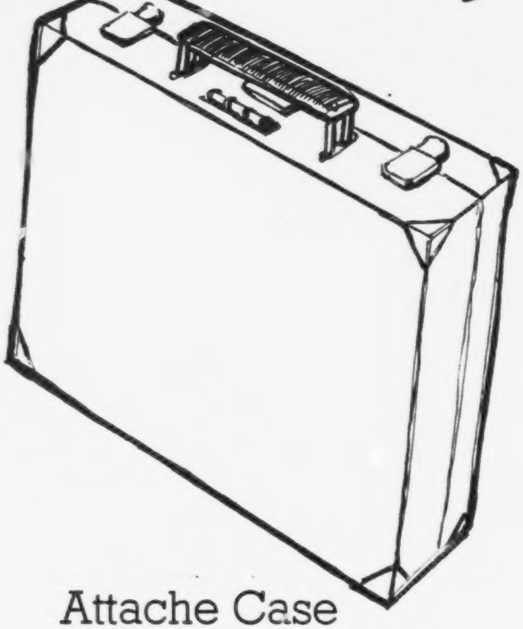
Simple Pumps



Attractive Pen

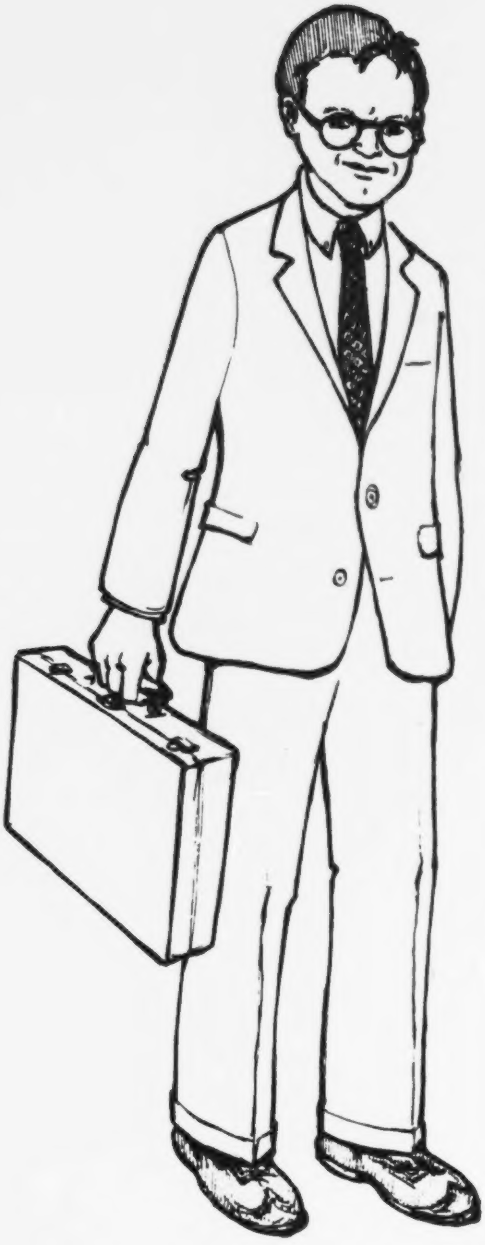


Plain Wristwatch



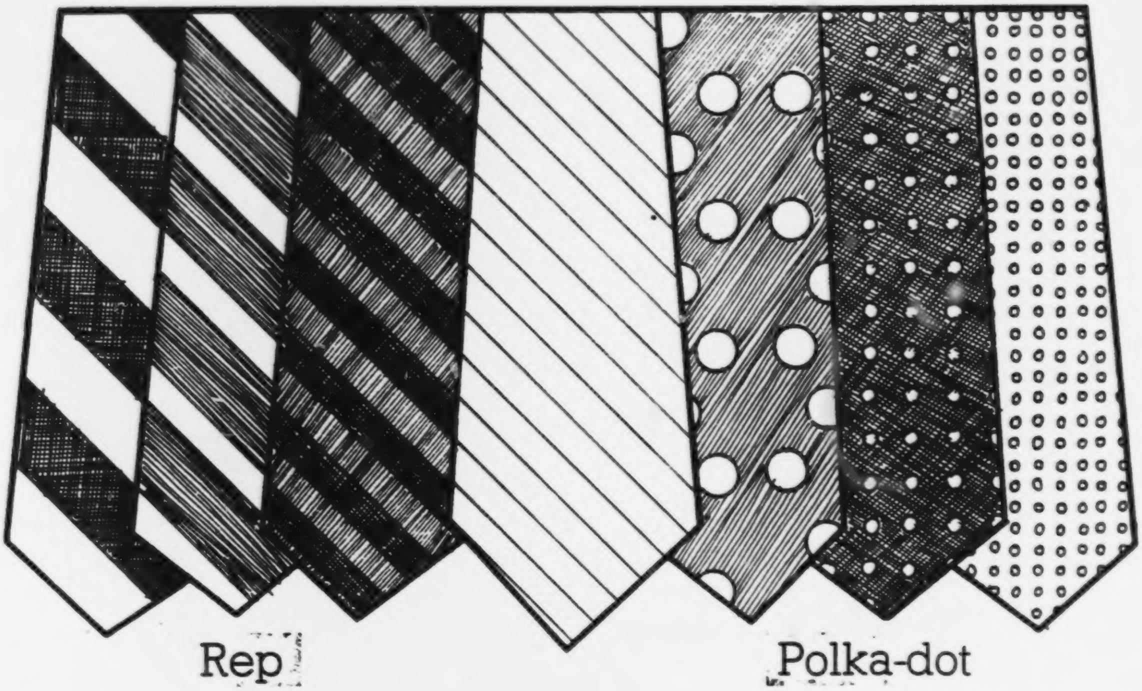
Attache Case

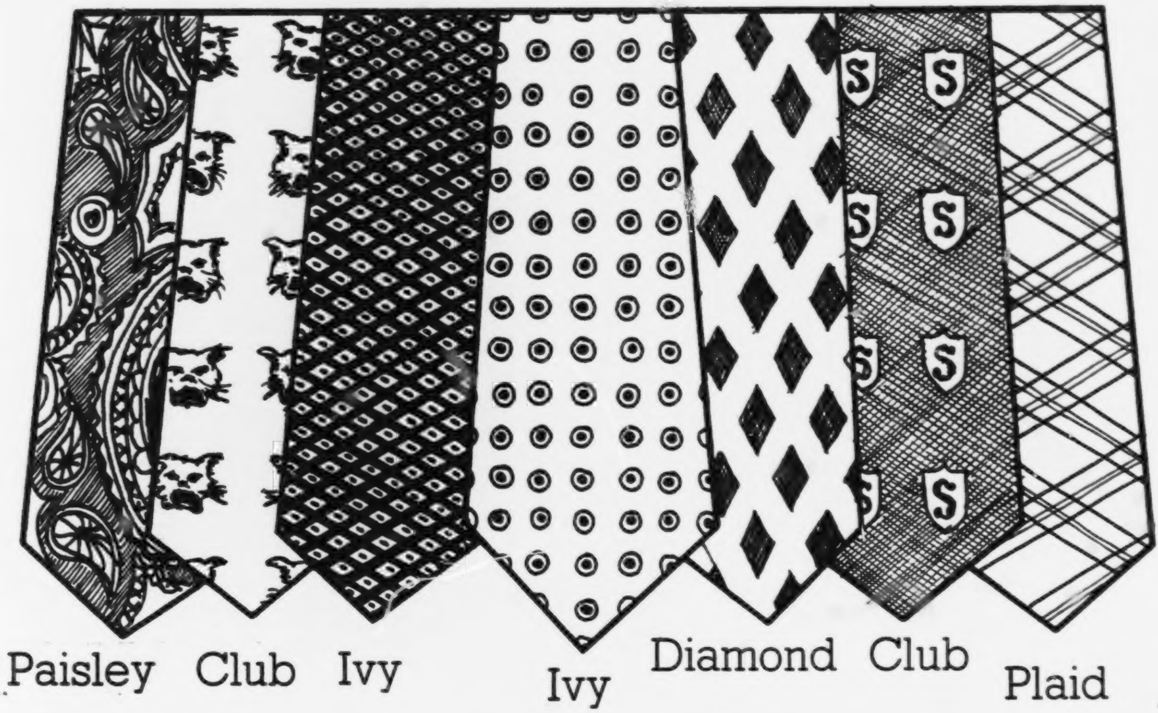
The Business "Uniform" for Men



TM 11

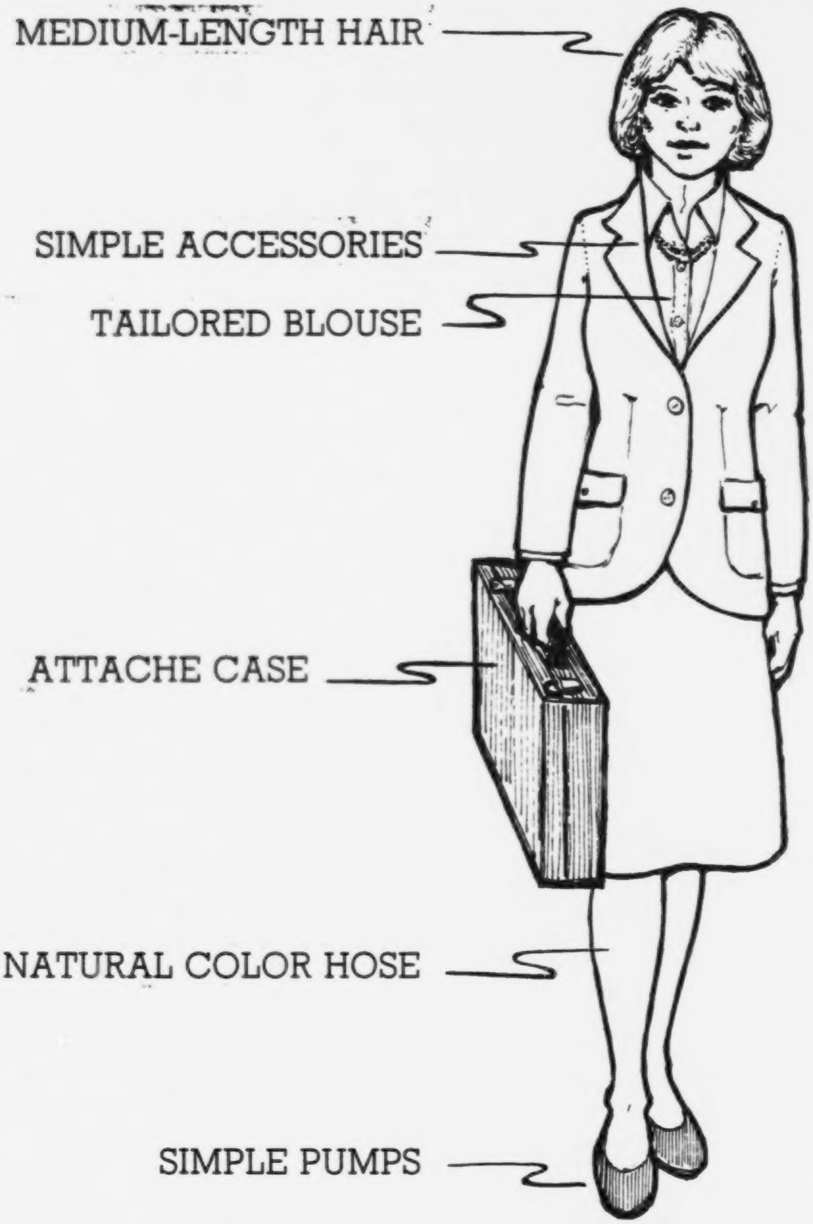
Ties


Rep
Polka-dot

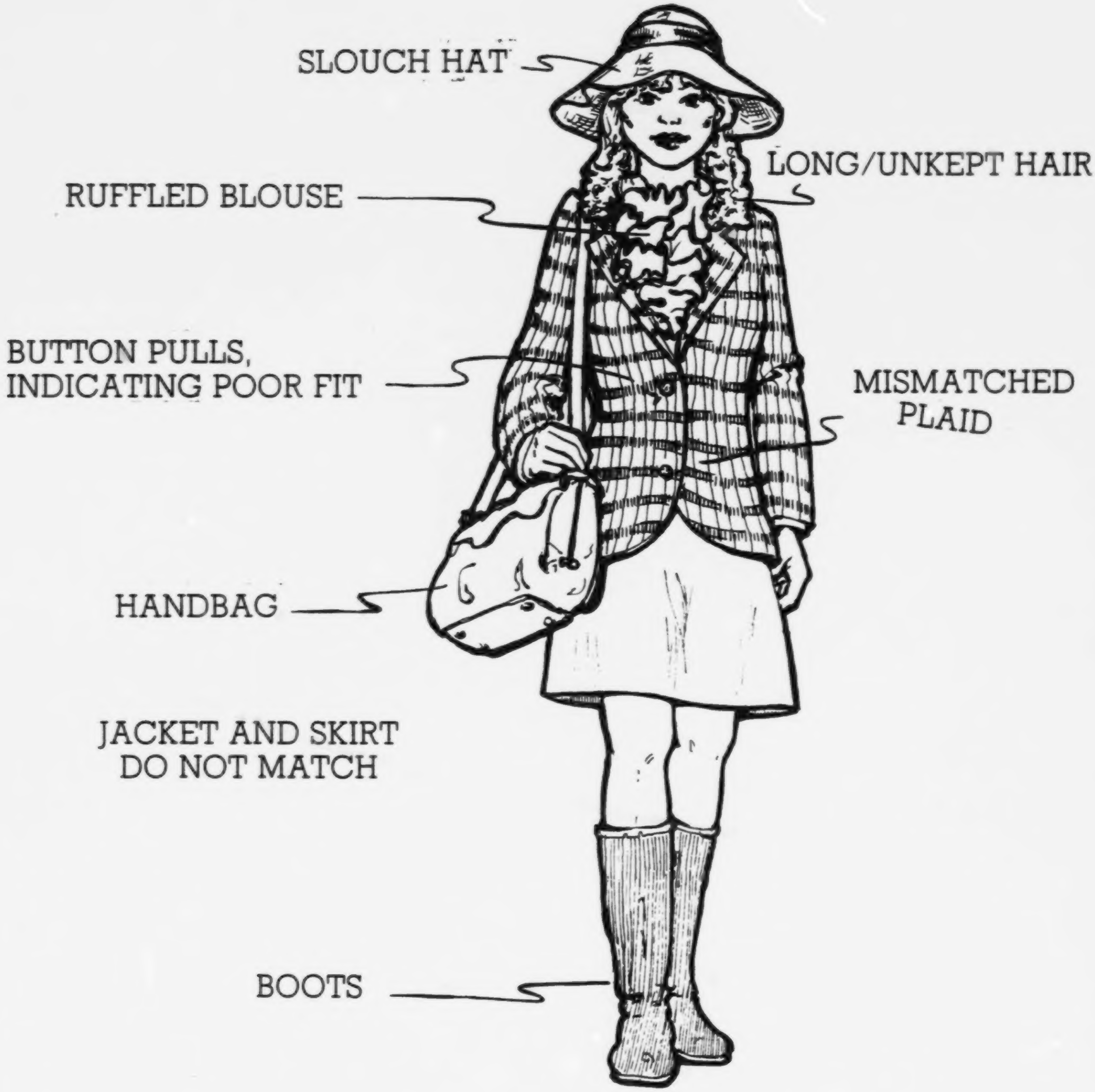

Paisley
Club
Ivy
Ivy
Diamond
Club
Plaid

TM 12

Women: The Fit

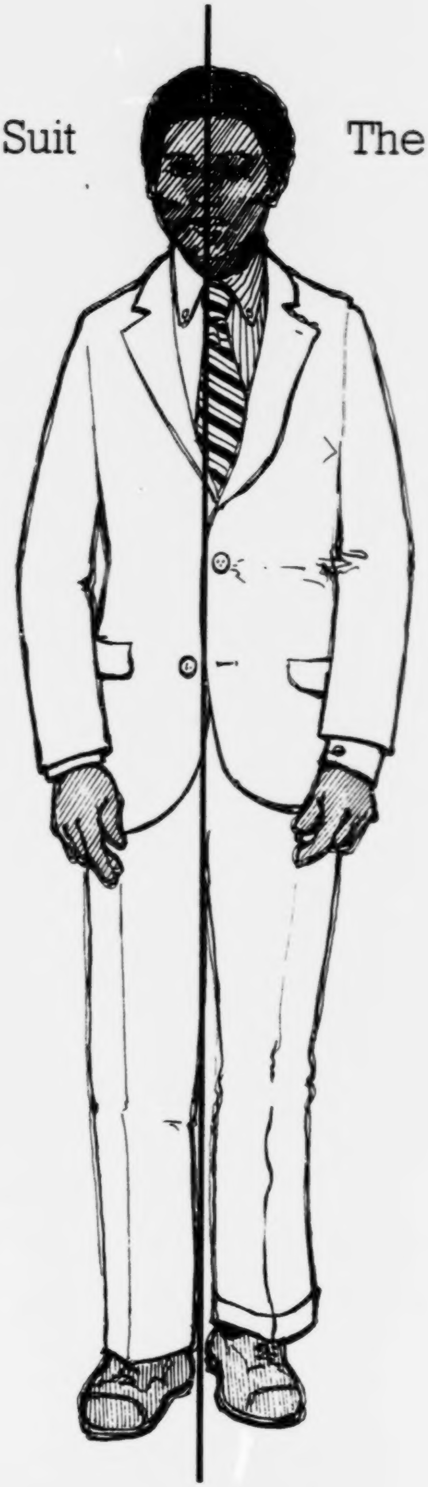

MEDIUM-LENGTH HAIR
SIMPLE ACCESSORIES
TAILORED BLOUSE
ATTACHE CASE
NATURAL COLOR HOSE
SIMPLE PUMPS

Women: The Unfit


SLOUCH HAT
LONG/UNKEPT HAIR
RUFFLED BLOUSE
BUTTON PULLS, INDICATING POOR FIT
MISMATCHED PLAID
HANDBAG
JACKET AND SKIRT DO NOT MATCH
BOOTS

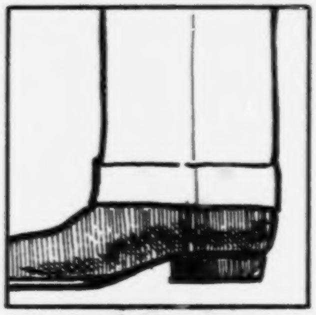
TM 14

Men: Which One?

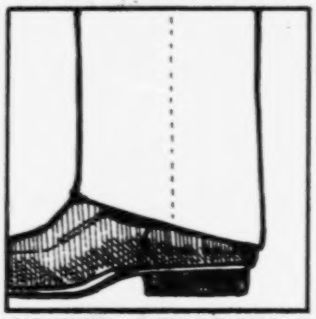

The Right Suit
The Wrong Suit

The Right Length

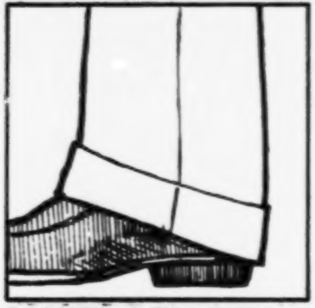
for Ties and Trousers



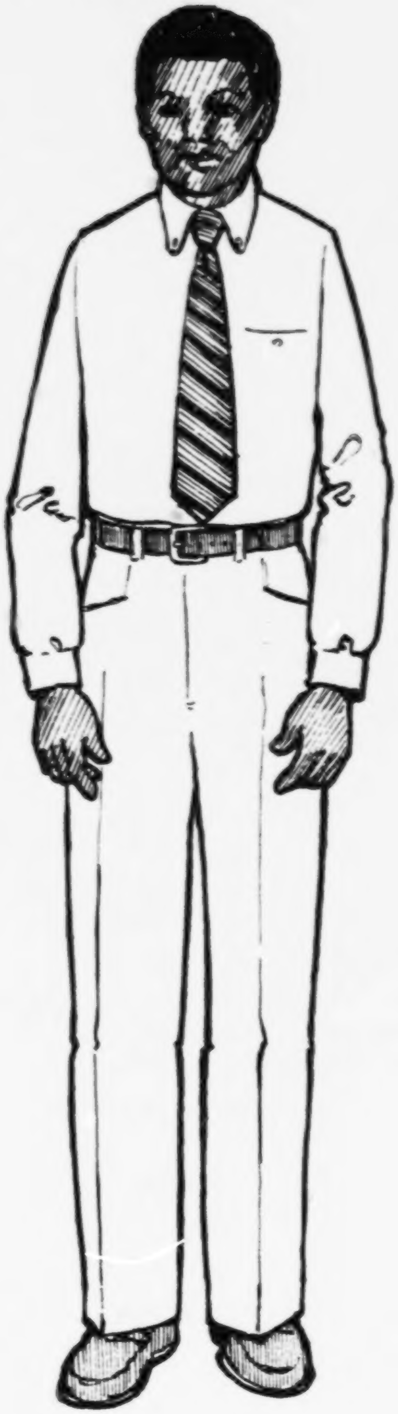
TROUSER LENGTH AND ANGLE WITH CUFF



TROUSER LENGTH AND ANGLE WITHOUT CUFF



TROUSER LENGTH AND ANGLE WITH FLARE CUFF



ASSIGNMENT SHEET 1: Wardrobe Inventory for Women

Inventory your wardrobe by item and description. Indicate the settings in which you would wear each garment.

	Home	Work	Social Events	Sports or Recreation
Suits (matching jacket and skirt)				
Pantsuits (matching jacket and slacks)				
Jackets or Blazers (to wear with skirts, dresses, or slacks)				
Slacks (dress)				
Slacks (casual)				
Blouses				
Dresses				
Sweaters (cardigan)				
Sweaters (pullover)				
Shoes (dress)				
Shoes (casual)				

ASSIGNMENT SHEET 1: Wardrobe Inventory for Men

Inventory your wardrobe by item and description. Indicate the settings in which you would wear each garment.

	Home	Work	Social Events	Sports or Recreation
Suits (matching jacket and slacks)				
Sports Coats				
Slacks (dress)				
Slacks (casual)				
Shirts (dress)				
Shirts (casual)				
Ties				
Shoes (dress)				
Shoes (casual)				
Belts (dress)				
Belts (casual)				

ASSIGNMENT SHEET 2: Choosing a Wardrobe

Directions: Develop on paper a business wardrobe of at least five complete outfits (including cost) that you could wear. Include at least five complete outfits, a lightweight coat, a winter-weight coat, and any other necessary items.

Use pictures from catalogs, magazines, etc. to assemble pictures of appropriate business wear based on what you've learned from this unit. Put each outfit and related information on a separate 8 1/2" x 11" sheet. If something that you select is not in color or not in the color which you would choose, indicate your preferred color.

A "complete" outfit includes all clothing, accessories, and shoes.

ASSIGNMENT SHEET 3: Wardrobe Evaluation

The first step in image management is assessing the strengths and weaknesses in your own wardrobe. This form will help you inventory the clothing and accessories you already have so you can coordinate your future purchases to develop the image you want.

Instructions:

1. Using the inventory which you prepared earlier, list the clothing you already have which is appropriate for business wear on the form below.
2. List and indicate in the "Don't Have" column all items that are recommended but missing.
3. Evaluate each item on your list to be added or replaced and assign each a purchase priority using the following scale:

0	No need; don't want
1	Essential; purchase as soon as possible
2	Needed; shop for quality/price (i.e., sales)
3	Nice to have; put on gift list?

Category Description	Have		Don't Have	Purchase Priority
	Acceptable	Replace		
Suits				
Jackets/Blazers				
Blouses/Shirts				
Dresses				
Skirts				
Pantsuits				
Slacks				
Shoes				
Ties/Scarves				
Belts				

Unit XII - Personal Development
Lesson 2 - Business Dress

ASSIGNMENT SHEET 4: What Would You Buy?

Directions: Analyze the amount of time each month that you spend in each of the following activities or settings:

	Number of Hours	Percent of Time
home		
work		
social events		
sports or recreation		

If you had $50 to develop your wardrobe, what would you buy?

If you had $100 to develop your wardrobe, what would you buy?

If you had $150 to develop your wardrobe, what would you buy?

If you had $200 to develop your wardrobe, what would you buy?

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1

1. Is the inventory complete?

2. Are descriptions adequate for remembering the items later?

3. Are items appropriately evaluated for usage?

Evaluation for Assignment Sheet 2

1. Is each outfit complete?

2. Is each outfit appropriate for business in your area?

3. Is each outfit appropriate for the student?

4. Are components of each outfit harmonious in color, style, texture?

5. Does the look of each outfit represent what was discussed in this lesson?

Evaluation for Assignment Sheet 3

1. Are the time estimates reasonable?

2. Do the expenditures blend with the student's time plan and existing wardrobe?

Evaluation for Assignment Sheet 4

1. Does the wardrobe plan/inventory represent a reasonable working wardrobe?

2. Is it complete?

3. Are item descriptions adequate?

4. Are item evaluations and priorities reasonable?

POSTTEST

I. Multiple Choice: Circle the letter of the best answer.

1. A handbag is appropriate for business if it __________ .

   a. is large enough to hold all that the businesswoman might need
   b. is small with little ornamentation
   c. is leather
   d. a and c
   e. b and c

2. First impressions are given primarily by __________.

   a. nonverbal communications
   b. dress
   c. voice
   d. grooming

3. The most important component of a positive image is __________.

   a. the business suit
   b. clean hair, sparkling smile, and fresh breath
   c. appropriate accessories
   d. consistency

4. According to John Molloy, the best choice for a businesswoman's clothing is

   a. dress with matching jacket
   b. man-tailored pantsuit
   c. skirt and sweater
   d. skirted suit

5. Hem length on a businesswoman's dress or skirt should be

   a. slightly below the knee
   b. slightly above the knee
   c. mid-calf
   d. the same length as current fashion

6. Which pair of shoes would be best for a businesswoman's wardrobe?

   a. leather boots because they look expensive
   b. less expensive, colorful shoes because she can afford several pairs to match her entire wardrobe
   c. trendy high heels because they would show that she keeps up to date on fashion
   d. a quality pair of pumps in a basic color because they could be worn with most outfits in her business wardrobe

7. Which of the following statements is not true of a businessman's best shirt choice?

   a. solid color is best
   b. only white is suitable
   c. the shirt color should be lighter than the suit color
   d. oxford cloth is suitable

II. True - False: Write TRUE for each statement which is True and FALSE for each one which is False.

__________ 1. A well-balanced wardrobe will have approximately the same proportion of clothing appropriate for work as the proportion of time spent in the working environment.

__________ 2. With the exception of wedding rings, only rings that lie flat to the hand are appropriate for business.

__________ 3. A woman with pierced ears should always wear earrings for business.

__________ 4. Makeup is acceptable in business if it is subtle.

__________ 5. The best look for the woman in business is the latest fashion.

__________ 6. Women in business should always wear a suit.

__________ 7. All office workers should dress approximately the same.

__________ 8. All businesses try to project a conservative image.

__________ 9. Appropriate business dress is even more critical to the successful woman than to the successful man.

__________ 10. Even though she is female, a businesswoman should not project an image that is frilly and fragile.

Unit XII - Personal Development
Lesson 2 - Business Dress

POSTTEST KEY

I. 1. e
2. b
3. d
4. d
5. a
6. d
7. b

II. 1. TRUE
2. TRUE
3. TRUE
4. TRUE
5. FALSE
6. FALSE
7. FALSE
8. FALSE
9. TRUE
10. TRUE

Unit XII - Personal Development
Lesson 3 - Keeping Your Job

LESSON OBJECTIVE

Given ten case problems concerning proper employment behavior, the student will identify the issue with 90 percent accuracy within 50 minutes.

SUGGESTED ACTIVITIES

I. Instructor

  A. Provide objectives, information sheets, and handout for students.

  B. Discuss information sheets and handout.

  C. Assign Assignment Sheets.

  D. Give posttest.

II. Student

  A. Read and discuss objectives, information sheets, and handout.

  B. Complete assignment sheets.

  C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Handout

  A. HO 1: Performance Appraisal Record

IV. Assignment Sheets and Answers

  A. AS 1: Case Problems Set 1
  B. AS 2: Case Problems Set 2
  C. AS 3: Case Problems Set 3

V. Posttest and Key

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INFORMATION SHEET

I. What does an employer expect from an employee?

   A. Ability to join the existing organization. A company is a composite of employees. An employer expects a new employee to join an existing organization--not change it immediately. New employees may have a fresh approach to solving an existing challenge but should not try to sell their ideas until they understand the challenge they're attempting to solve.

   B. Ability to project the company image both on and off the job. Every organization has an image or reputation by which it is known. Some are deliberately cultivated--others just seem to happen. People are often recognized during off hours by those with whom they have contact during their hours of employment. A negative contact during those off hours may affect an employee's effectiveness on the job.

   C. Effectiveness. An effective employee is one who can do the job which needs to be done at or above the required performance level without specific supervision. This requires dependability, thoroughness, and initiative.

   D. Efficiency. Doing the job right without unnecessary effort allows an employee to maintain a profitable output level while reducing job stress due to errors. This requires an employee to follow directions, accept constructive assistance, and seek improvement.

   E. Integrity. In hiring an employee, an employer is buying ability, potential, production, and time. When an employee is scheduled for specific work hours and expects full payment for those hours, the employer is justified in expecting the employee to be functioning in his/her capacity during the full time scheduled.

   While employees are responsible for time purchased by employers, they are also typically responsible for the employer's assets and data--prices and pricing structures, financial or legal information concerning the employer or customers, and product knowledge, as well as industry knowledge. A violation of this trust will typically result in reprimand and/or dismissal.

   F. Initiative. An employer appreciates a person who can determine what needs to be done and then completes the job without supervision.

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G. Confidentiality. Only employees who have demonstrated their ability to handle "top secret" information will be given the opportunity to do so. Employers appreciate employees who can keep silent about company activities until they are publicly announced.

H. Ability to accept responsibility. Cheerful workers who are able to complete their tasks correctly and on time are appreciated by both their co-workers and their employer.

I. Punctuality and Attendance. Employers have a right to expect their employees to be punctual. You should arrive at your desk a few minutes before your working day begins and work at a steady pace. Notify your supervisor as soon as possible if you must be absent or late for work.

II. How does an employer document employee performance? (HO 1)

A. Employee evaluation methods vary among employers. Some evaluate according to a specific schedule with rigidly structured procedures and documentation, while others evaluate irregularly with haphazard documentation. Typically, a larger company is more likely to have formal evaluation procedures. However, many smaller organizations also maintain structured evaluations.

B. The forms for employee evaluation also vary among employers. Some employers may use one instrument to evaluate management as well as the production staff, while others use instruments specifically designed for each area of employment within the company.

C. Maintaining documented employee evaluations provides an ongoing record of an employee's work in an organization. An employee may work with a variety of supervisors in multiple job slots during his/her tenure with an employer. Written evaluations will provide a continuing chronology of his/her performance without depending upon the memory or continued employment of previous supervisors.

D. Written evaluations are also frequently used to determine merit raises or promotions/advancement within the company. Evaluations may also be maintained in order to provide employment references following an employee's departure from an employer.

HO 1

Performance Appraisal Record

Category	Below Average	Average	Above Average	Exceptional
Work Output	Often falls short of established production standard	Is usually right around the standard	Sometimes exceeds standard	Regularly exceeds standard by large margin
Accuracy	Work is often inaccurate	Is within acceptance limits	Work is usually error-free	Always displays a high degree of accuracy
Thoroughness	Requires supervision to make sure everything gets done right	Usually reliable	Rarely leaves a job unfinished	Very meticulous
Neatness	Has sloppy work habits	Work and work area is reasonably well organized and generally good	Work is neat and very well organized	Is often a model for others
Reliability	Needs constant supervision	Requires normal supervision	Requires little supervision	Needs no supervision; can be trusted to do any job on own
Adaptability	Somewhat resentful of change	Makes normal adjustment to change	Adjusts willingly and readily to change	Helps to put change over
Cooperation	Cooperates reluctantly	Usually cooperative	Consistently cooperates and demonstrates goodwill	Goes out of the way to make others' jobs easier
Responsibility	Somewhat reluctant to accept responsibility	Will accept responsibility when given it	Willingly accepts responsibility	Looks for additional responsibility
Job Interest	Shows no enthusiasm for job	Shows enthusiasm, but it's not sustained	Shows sustained enthusiasm for job and other related areas	Takes an unusually strong interest in job and work
Interpersonal Relations	Resentful of criticism; sometimes tactless or inconsiderate	Gets along well with others	Open to suggestions; friendly and cooperative	Welcomes constructive criticism; always helpful and cooperative
Appearance	Sometimes untidy	Makes a passable impression	Always neat and appropriately dressed	Obviously spends time and effort on appearance; well groomed at all times
Absenteeism	Absent too often	Acceptable rate of absenteeism	Seldom absent	Rarely-if ever-misses a day
Tardiness	Frequently late	Occasionally late	Hardly ever late	Always on time

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ASSIGNMENT SHEET 1: Case Problems Set 1

Directions: Discuss the following situations. Identify the issue involved in each case and points to consider in resolving the situation.

1. Sara works for a company that manufactures seat belts. Because of the obvious company commitment to safety, one company policy is that all drivers and passengers in company vehicles must use the seat belts. While driving a company car on a quick errand, Sara was involved in a collision caused by another driver. Her injuries might have been prevented or minimized had she been wearing her seat belt, an item which was noted in the investigating officer's report as well as in the insurance reports. The company paid sick leave benefits during her convalescence but terminated her when she returned to work because she did not follow company policy. What's your reaction?

2. Ed works for a conservative accounting firm. His supervisor, Ms. Lemaster, is one of the most conservative staff members. Saturday evening after several drinks, Ed encountered Ms. Lemaster in a restaurant. Though Ed was not totally intoxicated, he was obviously not exercising sound judgment and offended Ms. Lemaster. When he arrived at work Monday morning, Ms. Lemaster terminated his employment. What do you think about this situation?

3. Your supervisor, the personnel director, has told you that Jim, one of the accounts receivable clerks, is facing termination due to frequent shortages in his cash count. In fact, because Jim has had several previous warnings, the next shortage will result in his dismissal. Jim is a friend of yours. Alaina, another friend of yours, wants to work for your company and asks frequently if you know about any potential openings. She really needs a job, and because she is unemployed, she could begin with very little notice. How do you handle all of this?

4. Craig Salcedo and Jennifer Quimby work at adjacent desks in the billing section of the bookkeeping department. Craig's invoices are always made out neatly and accurately but he normally has to search through several files before locating a specific invoice upon request. Jennifer's work is also neat and accurate. She annotates invoices, indicating status and the information needed for invoice completion. Craig has teased Jennifer about her "system," saying that she isn't any more effective in her work than he is and her "efficiency" is just for show. Jennifer was just promoted to another position in the bookkeeping department that has more responsibility and a better salary than she had as billing clerk. Craig believes that he didn't have a fair chance at the promotion. What do you think?

ASSIGNMENT SHEET 2: Case Problems Set 2

Directions: Discuss the following situations. Identify the issue involved in each case and points to consider in resolving the situation.

1. Maria Runez usually proofreads her transcription as soon as she completes it. At 4:15 p.m. her employer dictated several letters to go into that day's mail. Because Maria was in a hurry to leave, she mailed the letters without proofreading them as carefully as usual. One letter contained a typographical error in requesting payment for a past-due account. The account balance that should have read $72 was typed as $27. Three days later Maria's employer received a check for $27. Maria's employer said that Maria should pay the difference, the amount of her error. Maria feels that's unfair. What do you think?

2. Jared and Ashley, two department managers, were discussing their departmental activities one day over coffee. Ashley was obviously not having one of her better days. When Jared asked about the problem, Ashley told him that she had just terminated Bill's employment. A student and part-time employee, Bill could produce almost as much during his 4-hour workday as some of the other WP clerks could do during 8-hour days. The problem, however, was that Bill had missed 9 workdays during the past 4 weeks and none of the absences had been due to serious illness. When Bill is such a productive employee, why is Ashley willing to risk replacing him with an employee who might be less productive?

3. Last month the ten staff members in the office jointly purchased an office coffeepot and agreed to pay 50 cents weekly for unlimited coffee privileges. Two of the staff members consistently "forget" to pay their share and, consequently, the income does not quite match the expense of maintaining the coffee supply. What is your reaction?

4. You have a "dream" job--you enjoy performing your duties, receive a good salary and fringe benefits, and work in pleasant surroundings. During the time that you have worked in this position, you have made several suggestions for streamlining procedures, thereby reducing costs. Your supervisor has implemented several of your suggestions without acknowledging your contribution. A few days ago, you heard your supervisor's superior compliment her for your last idea. Your supervisor modestly accepted the praise. What is your reaction?

ASSIGNMENT SHEET 3: Case Problems Set 3

Directions: Discuss the following situations. Identify the issue involved in each case and points to consider in resolving the situations.

1. One of your co-workers has not been cooperating in helping your department meet its daily production quota. Her job is maintaining the records system; but she is constantly behind in her filing, making record retrieval difficult. Sometimes locating a file requires an hour or more. When others help her work through the backlog, their work accumulates. Even though she doesn't have time to complete her work, she always has time for an extra coffee break and running an extra errand during her lunch time. What do you think?

2. You and John work in a small office. Whenever he needs a pen or notepad, he "borrows" yours without asking, typically during a time while you are away from your desk. Then when you need the supplies, they are missing. How can you stop John from taking your supplies without straining your working relationship?

3. Your boss expects you to do a variety of non-job-related tasks such as mailing personal bills, watering the plants in her office, picking up her clothes at the cleaners, fixing her coffee, etc. How would you handle these situations?

4. After numerous clashes with the supervisor in the quality control division, Bob was transferred to the warehouse staff. He has worked for three other large companies and has been with this company just over two years. Co-workers rarely hear him make any positive comments about his work or about the company in general. Instead, he complains and talks about how working conditions, employee relations, salary, etc. were so much better in the other companies where he worked. He is successful at keeping the entire warehouse office staff agitated. At lunch in the restaurant around the corner today, the company general manager overheard Bob's outspoken criticism of the company during a conversation with someone who did not work for the company. When Bob returned to work, he was terminated. Was that fair?

ANSWERS TO ASSIGNMENT SHEETS

ASSIGNMENT SHEET 1

CASE PROBLEM 1

Issue: employee failure to follow company policy

Consideration:

1. The company paid full benefits even though the need for those benefits resulted in employee termination.
2. An employee's failure to follow policy could result in damage to the company's image. If the product is so safe, why do company employees not use it?

CASE PROBLEM 2

Issue: employee after hours behavior as basis for continued employment

Considerations:

1. Was Ms. Lemaster concerned about Ed's behavior on a personal or professional basis?
2. Was Ed identified with his employer during this evening or was he "just a person?"
3. Was Ms. Lemaster with a client or friend?

CASE PROBLEM 3

Issue(s): discretion: to warn Jim or not
to tell Alaina or not

Considerations:

1. Which is more important: Friendship or loyalty to employer?
2. How to handle potential stress of strained friendships?

CASE PROBLEM 4

Issue: effectiveness on the job

Consideration:

Employees are constantly evaluated for both their success in current position as well as continued potential in the organization. Employees should not be expected to be told that they are being considered for promotion so that they can improve their performance.

ASSIGNMENT SHEET 2

CASE PROBLEM 1

Issue: responsibility

Consideration:

The signer of a letter has ultimate responsibility for its contents.

CASE PROBLEM 2

Issue: the value of attendance/reliability

Considerations:

1. Potential effect of Bill's irregular attendance upon other employees--"follow the leader?"

2. Is this a threat to morale if Bill does not fulfill his work responsibility and others have to do his work for him?

CASE PROBLEM 3

Issue: staff cooperation and harmony

Considerations:

1. Would collecting $2 or $3 per month rather than $.50 weekly or a similar amount on each payday be a solution? Perhaps collecting less frequently but for "round" sums of money will be easier.

2. Rather than collect money, the staff members could alternate in buying the coffee. When the specified quantity of coffee that employee A purchased has been consumed, the staff will have no more coffee until employee B purchases the specified quantity.

3. Is the convenience of the coffeepot worth the staff discontent or would it be better to sell the shared coffeepot and return to the previous coffee method?

CASE PROBLEM 4

Issue: recognition of effort

Considerations:

1. Did your supervisor realize that she accepted full recognition without sharing it with you for your idea?

2. If you approach your supervisor's superior to state your involvement with the successful suggestion, she may not believe you.

3. Can you verify through memo or other record that you were involved in the suggestion?

4. What if your supervisor had been developing a similar suggestion and your suggestion coincidentally paralleled the idea?

5. Do you receive other recognition for your efforts? Is this lack of recognition hampering your effectiveness in doing your job? If so, have you communicated this to your supervisor?

ASSIGNMENT SHEET 3

CASE PROBLEM 1

Issue: effectiveness/efficiency

Considerations:

1. Is the co-worker aware that she is not doing her job at the expected performance level? Is the supervisor aware?

2. Does the co-worker understand how her job duties affect the work performance of other workers?

3. Does the co-worker need some help in ways to improve her efficiency? Is she bored? Is she not trained to the job for which she is responsible?

CASE PROBLEM 2

Issue: communication, effectiveness, efficiency

Considerations:

1. Does John realize that what he does impairs your working efficiency?

2. Have you discussed the matter with John?

CASE PROBLEM 3

Issue: responsibilities not related to job

Considerations:

1. Are you expected to perform these duties on company time or on your own time? Does your boss own the company or is she "just another employee?"

2. Does your boss do "extra" things for you in return for performing these duties for her?

3. Does performing these duties prevent you from accomplishing the tasks of your job in the company?

4. Have you been asked to do or are you expected to do things which are unethical--such as using company postage for the personal bills, charging personal bills to the company, etc?

CASE PROBLEM 4

Issue: employee loyalty, discretion, image

Considerations:

1. If conditions were so much better in the other companies where Bob worked, why is he not working for one of them now?

2. With constant agitation within a department, other employees are prevented from working to their potential because of Bob.

3. What effect does Bob's steady criticism of the company have on corporate image?

POSTTEST

I. **True-False:** Write **TRUE** in the blank provided if the statement is True and **FALSE** if it is False.

_________ 1. An employer expects a new employee to recommend changes beginning on his/her first day of employment.

_________ 2. A company may require that its employees wear a specified uniform as a way to control company image.

_________ 3. An employee's time is an employer's asset.

_________ 4. Written evaluations may be used to determine salary increases or promotions.

II. **Multiple Choice:** Place the letter of the best answer in the blank at the beginning of each statement.

_________ 1. Efficiency is ____________________ .

a. doing the right job
b. doing the job right
c. staying busy
d. not necessary

_________ 2. Effectiveness is ____________________ .

a. doing the right job
b. doing the job right
c. for supervisors but not entry-level employees

_________ 3. Performance evaluations are ____________________ .

a. formal
b. informal
c. both a and b
d. illegal

_________ 4. Performance evaluations are ____________________ .

a. maintained in permanent file
b. retained one year
c. destroyed
d. illegal

__________ 5. Written evaluations may be used to determine:

a. salary increases
b. promotion
c. employment reference
d. all of the above
e. none of the above

III. Analyze the following case, identify the issue, and discuss the points to consider in recommending a solution.

One of your co-workers is active in several social and political activities which she enthusiastically discusses at the office, sometimes to the point of "lecturing" on the topic. Often the others in the office agree with her position in an attempt to shorten the discussion time so that everyone can return to work. She also circulates petitions related to her interests among the office staff. What can be done?

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POSTTEST KEY

I. 1. FALSE
   2. TRUE
   3. TRUE
   4. TRUE

II. 1. b
    2. a
    3. c
    4. a
    5. d

III. Issue: separation of work from non-work activities

Considerations:

1. Does company policy allow petition circulation and other such activities on company premises?
2. Can you volunteer to discuss the topic of interest during lunch or break time rather than during work?
3. Are discussions with this co-worker hampering your ability to complete your work? If so, is she aware of this? Is your supervisor?
4. Could one of the department staff talk to the co-worker with a request to confine her non-work activities to non-work time?

Unit XII - Personal Development
Lesson 4 - Personal Goal Setting

LESSON OBJECTIVE

Given a career assignment sheet, the student will assess one career choice listing its requirements and working conditions with 90 percent accuracy within 50 minutes.

SUGGESTED ACTIVITIES

I. Instructor

  A. Prepare transparencies.

  B. Provide objectives and information sheets for students.

  C. Assign Assignment Sheets.

  D. Give posttest.

II. Student

  A. Read and discuss objectives and information sheets.

  B. Complete Assignment Sheets.

  C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Transparency Masters

  A. TM 1: If You Don't Know Where You're Going....
  B. TM 2: Talents/Skills

IV. Assignment Sheets and Answers

  A. AS 1: Activities
  B. AS 2: Strengths and Weaknesses
  C. AS 3: Your Career
  D. AS 4: You and Your Career

V. Posttest and Key

INFORMATION SHEET

I. Making Decisions About Your Life (TM 1): Before you set your personal goal, consider the following:

  A. Talents and skills (TM 2)

    1. Is the skill relevant to an occupation?

    2. Will other people pay you to teach this skill?

    3. Will the skill continue to be useful through life?

    4. Will using this skill enable you to gain new experiences and master new environments?

    5. Do you like using this skill?

  B. Intelligence, imagination, persistence

    1. Be creative in using intelligence.

    2. Set a realistic goal which you can achieve.

    3. Use it or lose it!

  C. Motivation

    1. Different things motivate different people.

    2. Most people choose to do what they consider to be worthwhile.

    3. People are usually consistent in their motivation level.

    4. People tend to perform at about the same level as those around them.

  D. Friends--the adage "birds of a feather flock together" has been proven true.

  E. Education

    1. Study a subject which you enjoy.

    2. Attend the best educational institution possible.

    3. Do as well as you can wherever you go.

F. Family

1. Consider your responsibilities to your family.

2. Consider your reaction to your family's reaction to your decision.

G. Experiences

1. Realistic, practical, mechanical

2. Scientific, laboratory

3. Artistic, musical, literary

4. Social, "people-related"

5. Enterprising, sales, persuasive

6. Conventional, methodical, office

H. Appearance

1. A good appearance strengthens self-concept and self-confidence.

2. Attractive people tend to receive more "breaks" than unattractive people.

I. Health

1. Good health is your most important asset; without it, your other assets lose value.

2. The most common American health problems are:

a. Obesity

b. Lack of exercise

c. Drug dependence (including tobacco and alcohol)

II. Impact of Career Choice. One of your most important personal goals is your career choice. Your career will affect many aspects of your life. Consider each of the following:

A. During working hours:

1. Activities

2. Environment

a. Physical

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b. Co-workers

3. Money earned

B. Other considerations:

1. Economic level, standard of living
2. Recreation, travel, leisure activities
3. Lifestyle
4. Geographic location

If you don't know where you're going---

You'll probably end up somewhere else!

Talents	Skills
(general abilities)	(specific abilities you work to develop)
musical	playing the piano
mathematical	accounting expertise
athletic	playing under par golf

ASSIGNMENT SHEET 1: Activities

Directions: In each of the categories provided, list at least five activities and/or items from which you:

	DO derive pleasure or fulfillment	DO NOT derive pleasure or fulfillment
WORK		
LEARNING		
SOCIAL		
PERSONAL		

ASSIGNMENT SHEET 2: Strengths and Weaknesses

Directions: Designate five strengths and weaknesses according to your skills and abilities. Include people-related skills (i.e., speaking to groups or individuals, directing others, helping to solve a problem, listening, concern for the "underdog," etc.) as well as task-related skills (i.e., organizing activities to meet deadlines, focus on task, creativity, attention to detail, pride in completion, responsibility for follow-through, routine, lack of routine, etc.).

STRENGTHS	WEAKNESSES

ASSIGNMENT SHEET 3: Your Career

Directions: Complete the following assignment sheet.

Career Goal: ____________________

Duties: ____________________

Working Conditions:

Environment: ____________________

Potential Hazards: ____________________

Equipment Used: ____________________

Requirements for This Career:

Skills/Experience: ____________________

Education: ____________________

Physical Abilities: ____________________

Potential Salary Range: ____________________

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Future of This Career: ______________________________

Growth/Advancement Potential: ______________________________

____

____

Stability of Position: ______________________________

____

____

Non-Employment Restrictions Imposed By This Career: (i.e., geographic location, health requirements or hazards, etc.) ______________________________

____

____

____

____

ASSIGNMENT SHEET 4: You and Your Career

Directions: Complete the following assignment sheet.

Career Goal: ______________________________

Duties which you like to do: ______________

Duties which you dislike: ______________

Working Conditions:

What do you like about this working environment? ______________

Can you work with these potential hazards? What will you do to protect yourself? ______________

List the equipment you can operate now. Where will you learn to operate the remainder? ______________

Requirements for this career:

Which skills do you now have? Where/how will you develop the others? Where/how will you gain the needed experience?

Where/how will you gain the needed education? How will you fund this education?

Are your physical abilities equal to job requirements? ______________

Potential Salary Range: ______________

Future of this career: ______________

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Do you want to grow/advance in this career? ______________________

____

____

Will you be willing to seek additional education to either maintain your position or to retrain for another? ______________________

____

____

Are you willing to accept the non-employment restrictions imposed by this career: ______________________

____

____

What other factors must also be considered in your decision (i.e., marriage, children, responsibilities involving parents or other family members, intent to live in specific geographic area)? ______________________

____

____

____

Date when you plan to achieve your career goal: ______________________

ANSWERS TO ASSIGNMENT SHEETS

Evaluation for Assignment Sheet 1

Each category should include at least five entries. This inventory should be an honest self-evaluation which is CONFIDENTIAL between the student and instructor.

Evaluation for Assignment Sheet 2

This inventory should contain at least five entries in each designated area. The student should be able to cite examples supporting each entry. These may be used later in discussing skills and abilities to "sell" to an employer.

Suggestions for Evaluating Assignment Sheets 1, 2, 3, and 4:

1. Is the student's career goal consistent with his/her education plan?

2. Is the student's education plan consistent with his/her funding plan?

3. Is the student's career goal consistent with his/her likes/dislikes and strengths/weaknesses?

4. Is the student's plan for other responsibilities consistent with his/her education plan and career goal?

5. Is the student's career goal consistent with his/her skills, abilities, commitments, and potential?

POSTTEST

I. True-False: Write TRUE in the blank provided if the statement is True and FALSE if it is False.

_________ 1. The influence exerted by friends typically affects a person's career decision.

_________ 2. A person with excellent skills but poor health will probably have no difficulty in securing or maintaining a job.

_________ 3. A person's career will not influence his/her outside activities.

_________ 4. The environment in which a person chooses to work may influence his/her career choice.

_________ 5. A person's appearance has little to do with success in career choice.

_________ 6. A person who attends a poor school will have the same career opportunities as one who attends a respected school.

II. Multiple Choice: Circle the letter of the best answer.

1. The most common American health problems are:

    a. too much weight, too little exercise, and dependence upon drugs
    b. too little weight, too much exercise, and hypertension
    c. diabetes, cancer, and hypertension
    d. stress-related problems, hypoglycemia, and poor hearing

2. Goals for your future should be based upon:

    a. talents and skills, intelligence, motivation
    b. imagination, education, family
    c. experience, health, persistence
    d. all of the above
    e. only 2 of the above

3. A person may select a career based upon:

    a. salary
    b. chosen lifestyle
    c. leisure activities
    d. chosen geographic area
    e. all of the above
    f. none of the above

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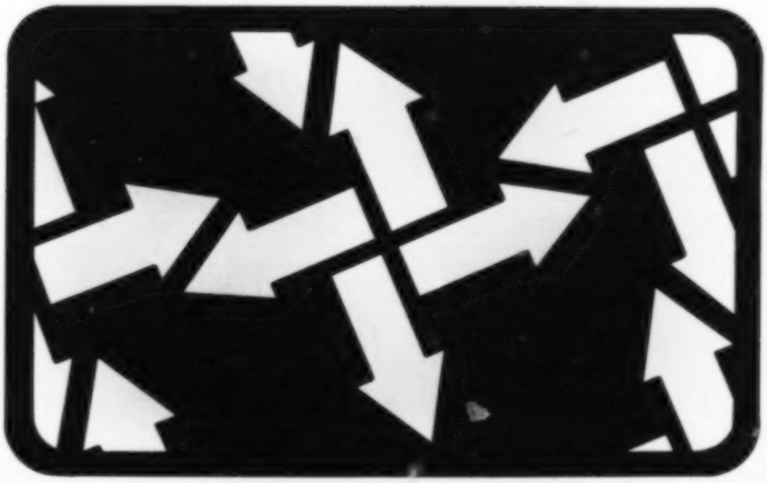
POSTTEST KEY

I. 1. TRUE
2. FALSE
3. FALSE
4. TRUE
5. FALSE
6. FALSE

II. 1. a.
2. d.
3. e.



Making Decisions and Solving Problems

UNIT XIII: Making Decisions and Solving Problems

Unit XIII - Decision Making/Problem Solving

UNIT OBJECTIVE

Upon completion of this unit, the student will be able to utilize the five-step process to facilitate decision making and prioritize tasks according to the urgency of a situation. This will be demonstrated through recommending solutions to case problems and an office simulation project.

COMPETENCIES

1. Describe types of service offices
2. List skills required in service offices
3. Describe requirements for legal typing
4. List qualifications for becoming a notary
5. Describe procedures for becoming a notary
6. Describe responsibilities of a notary
7. Type forms used in service offices
8. Compose and type a letter to a client
9. Type medical and legal documents from longhand copy
10. Type legal or medical letters from oral or machine dictation

LESSON OBJECTIVES

1. Given a case problem and a 15-minute preparation period, the student will recommend and defend a solution to the problem with 90 percent accuracy according to a problem solving checklist.

2. Given details of a business meeting, the student will prepare an agenda with 90 percent accuracy within 45 minutes.

3. Given notes about a two-day out-of-town business trip, the student will make a detailed list of the necessary arrangements with 90 percent accuracy within 30 minutes.

4. Given handwritten information concerning an out-of-town business trip, the student will prepare an itinerary with 90 percent accuracy within 50 minutes.

5. Given details concerning an emergency that arises in the office, the student will list specific measures for attending to the emergency with 90 percent accuracy within 15 minutes.

6. Given specific facts concerning a business meeting, the student will compose and prepare for mailing a cover letter to the Board of Directors of a company with 90 percent accuracy within 30 minutes.

7. Given the necessary information and form, the student will complete a check request with 90 percent accuracy within 10 minutes.

8. Given a handwritten speech with corrections, the student will type a mailable copy of the speech with 90 percent accuracy within 45 minutes.

9. Given details concerning an accident, the student will prepare a deposition to be signed by a witness and a notary with 90 percent accuracy within 30 minutes.

10. Given a news release on a transcribing machine, the student will prepare a mailable copy for release to the media with 90 percent accuracy within 30 minutes.

11. Given financial information concerning a business operation, the student will prepare a financial table showing gross and net receipts with 90 percent accuracy within 30 minutes.

12. Given dictated information regarding an announcement to be made to all office personnel, the student will prepare an interoffice memorandum with 90 ercent accuracy within 20 minutes.

REFERENCES

I. Books and Pamphlets

A. Blanc, Iris. Skill Building Exercises for the Word Processor. New York, NY: Dictation Disc Co., 1985.

B. DuPree, Garland Crowe, and Mamanny, Dorothy S. Legal Office Typing. Cincinnati, OH: South-Western Publishing Co., 1984.

C. Everard, Kenneth E., and Burrow, Jim. Business Principles and Management, 8th ed. Cincinnati, OH: South-Western Publishing Co., 1984.

D. Kutie, Rita C., and Rhodes, Joan L. Secretarial Procedures for the Electronic Office. New York: John Wiley and Sons, Inc. 1983.

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F. Popham, Estelle L., et. al. Secretarial Procedures and Administration, 8th ed. Cincinnati: South-Western Publishing Co., 1983.

G. Reynolds, C. Dimensions in Professional Development. Cincinnati, OH: South-Western Publishing Co., 1983.

H. Rosen, Arnold and Hubbard, William. Word Processing Keyboard Applications and Exercises. New York, NY, 1981.

I. Russon, A.R., and Wallace, H.R. Personality Development for Work. Cincinnati, OH: South-Western Publishing Co., 1981.

II. Software*

*Software descriptions have been taken directly from the publishers and/or vendors.

A. Business Forecasting. Computer Modules for Business Education, 1983. For: Apple II; IIe.

One of a series of five, this module shows students typical computer applications in business and how computers will affect their future job descriptions. Available from Career Aids, Incorporated, 20417 Nordhoff Street, Department K65, Chatsworth, CA 91311.

B. Electronic Arts, The Financial Cookbook, Cincinnati: South-Western Publishing Company. For: Apple II; IIc; IIe; II+; IBM PC; XT; PC jr; Commodore 64.

This software utilizes an easy-to-use, time-saving format that facilitates quick and accurate calculations for projecting mortgages, loans, investments, and buy-or-rent comparisons from basic inputs. It is organized into over 30 basic financial questions (such as, inflationary effects on income, saving to meet monetary goals, IRAs, insurance, etc.). Students choose the question that they want answered and the program provides a template to be filled in with the student's own data. It then computes an answer completely customized to consider individual tax implications, expected inflation, income, and more. Available from South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

C. Statistics. Computer Modules for Business Education, 1983. For: Apple II; IIe.

One in a series of five, this module shows students typical computer applications in business and how computers will affect their future job description. Available from Career Aids, Incorporated, 20417 Nordhoff Street, Department K65, Chatsworth, CA 91311.

NOTES TO THE INSTRUCTOR

1. This unit is intended to be initial instruction in structured decision-making and should be taught early in the course.

2. In life, many decisions must be made appropriate to a specific situation because of the influencing details. The same is true in the case studies included in this unit. The value in these case studies will be the discussion and student interaction which is

generated. The instructor's role will be a combination of giving positive reinforcement and playing the "devil's advocate" to guide discussion and stimulate student "discovery" of the concepts presented.

3. Following completion of this unit, decision-making problems should be developed by the instructor and injected into all units.

Unit XIII - Decision Making/Problem Solving
Lesson 1 - Case Problems

LESSON OBJECTIVE

Given a case problem and a 15-minute preparation period, the student will recommend and defend a solution to the problem with 90 percent accuracy according to a problem solving checklist.

SUGGESTED ACTIVITIES

I. Instructor

  A. Provide students with objectives and information sheets.

  B. Explain the "Five-Step Approach to Decision Making" and guidelines for making decisions.

  C. Share problem solving checklist with students before presenting the assignment sheets.

  D. Assign Assignment Sheets. Since students must compose answers to these assignments, they may prefer to complete them using word processing software on microcomputers.

  E. Give posttest.

II. Student

  A. Study objectives and information sheets.

  B. Complete Assignment Sheets and discuss case problems.

  C. Complete posttest and discuss your answers with the class.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Assignment Sheets and Answers

  A. AS 1: Case Problem 1
  B. AS 2: Case Problem 2
  C. AS 3: Case Problem 3
  D. AS 4: Case Problem 4

IV. Posttest and Key

INFORMATION SHEET

I. The Five-Step Approach to Decision Making

A. Identify the problem in a clear and concise statement.

Assume that you have been working in the word processing center for about 1 1/2 years when the supervisor takes an emergency leave for at least 6 months and you are named acting supervisor for that length of time. Polly Schmidt has been in the department nearly five years and expected to receive the interim supervisor's position. She continues doing her job but is noncooperative. Now the others in the department are taking sides and morale is low. What is the problem?

The problem is not determining why Polly should act like this. The problem is not deciding whether an employee with less in-house tenure should be promoted over another with more company service. The problem is what you are going to do about the situation as it is.

B. Identify the facts without prejudice, opinion, or emotion, and then arrange the facts according to importance.

C. Identify your overall objective.

It may be specific--to keep your job--or it may be broad--to keep your job, restore peace and morale, and increase productivity to a new high.

D. Identify solutions. Brainstorm. List the extreme solutions first. Since they are not usually the best ones, listing them first allows you to move on to identifying more productive ones.

1. Fire Polly Schmidt.
2. Resign from your job as interim supervisor.
3. Leave the company.
4. Consider the human relations factors involved, and determine how to approach the situation while getting the center's work completed in the best way.

E. Select the best solution and implement it.

1. Ignore Polly's resentment and begin building a better feeling between the two of you. Ask her (without ceremony or undue attention) to take charge of a particular project and then commend her for the good work done.

2. Remember that authority is not successful on an equal basis. Space must be between the one in authority and the ones over whom authority exists. A supervisor, especially a new one, cannot expect to be liked by all of the workers she/he supervises. A supervisor is selected by her/his superiors to do a job and, therefore, the supervisor should do all possible to be successful in that job.

An impersonal attitude toward others' negative feelings, plus a sincere determination to earn your workers' respect, will encourage the needed change in their attitudes. If you keep your attention on getting the work done while maintaining a fair and positive attitude toward those whom you supervise, you should expect the morale to improve over time.

II. Guidelines for Decision Making (AS 1, 2, 3, 4)

A. Avoid making a decision under stress. Delaying the decision will allow you to identify the problem, the facts, and your objective rationally without anger or emotion.

B. Avoid making snap decisions. Many decisions are made on the basis of evaluating the strong points and disadvantages relative to an issue. Certain decisions are appropriate to a specific situation because of influencing details.

C. Make a decision when it is needed. Delaying it unnecessarily will only add it to an already overflowing accumulation of unfinished business.

D. When others will be affected by your decision, consult them. If possible, involve them in the decision-making process.

E. Base your decision on the facts available at the time a decision is needed. You will never have all the facts!

F. Don't fear making a wrong decision. An important decision rarely depends upon a single opportunity. Problem solving is a process of taking an initial direction and making midcourse corrections en route to the goal.

G. Once a decision is made, go on with your priorities. Worrying about past decisions only prevents you from giving full attention to current situations. You cannot change the past--but your decisions will change the future.

ASSIGNMENT SHEET 1: Case Problem 1

Directions: Use the five-step approach to solve each of the following situations.

1. Your supervisor, Ms. Kirschner, is away for a week-long business trip. One of the managers comes in and demands that you call her long distance because of a personal conflict with another manager. You have Ms. Kirschner's itinerary but she asked you not to bother her with ordinary matters, since she plans to be very busy and seldom in one place long enough to take a telephone call. Mr. Chung, Ms. Kirschner's assistant, is handling routine matters in Ms. Kirschner's absence.

2. Your company depends upon products supplied by Southwest Corporation. Ken Whitworth, the Southwest sales representative, arrives and asks to see Ms. Kirschner.

3. Ms. Kirschner's first day back in the office is extremely hectic. At 3 o'clock, Ms. Kirschner went into her office with two managers, giving you instructions that they were not to be disturbed. An important client comes in on urgent business that he says cannot wait. What do you do or say?

ASSIGNMENT SHEET 2: Case Problem 2

Directions: Using the five-step approach, indicate your reaction to the following situation.

Verifying credit status on customer orders is one of your responsibilities. After completing his work for the day, Ron volunteered to help you complete your work. While doing credit verification, he made a keying error which accessed the record of a customer with a poor payment record, and, not realizing his error, applied that unfavorable credit status to a RUSH order placed by a customer with an excellent payment record. When the customer received notice that her order would be held pending payment of her account balance, she called your general manager and threatened to buy from a different supplier. The general manager reprimanded your department manager who in turn reprimanded you. When you said that the error had been Ron's, your manager continued to hold you at fault and said nothing to Ron.

ASSIGNMENT SHEET 3: Case Problem 3

Directions: Using the five-step approach, answer the questions following the situation described below.

After working for InterComp for four years, Mary was named data entry supervisor in the accounting department. One of Mary's high school friends, Carla, had been hired as the accounting department secretary just a few days before Mary's promotion was announced. On the day of the announcement, Carla invited Mary to lunch to celebrate her promotion.

As Mary, how would you answer Carla's invitation?

What would be the office response if Mary accepts the invitation?

ASSIGNMENT SHEET 4: Case Problem 4

Directions: Use the five-step approach to solve this problem.

Mr. Chucalo, a promising young attorney, has just passed his bar and opened a practice in criminal law. The pressure of establishing a practice without much money forced him to hire a young, inexperienced staff from whom he demands high output with much criticism and little praise.

When Erin gave Mr. Chucalo a letter in which she had made a grammatical change, Mr. Chucalo drew a glaring mark under the word she had changed. She was upset because the change could have been corrected without retyping had the mark not been added, but the change, in fact, was correct.

Meanwhile, John has been searching through the legal dictionary for a particular Latin term which he could not understand from the context or pronunciation on tape. While John was asking Erin to help him identify the term, Mr. Chucalo walked through and growled, "Do your own work, children."

Erin and John understand that Mr. Chucalo is under tremendous strain now but that they each have an excellent future in the practice if they can last through the current financial strain. They each enjoy the challenge of working in a legal office but the current stress is nearly intolerable.

ANSWERS TO ASSIGNMENT SHEETS

PROBLEM SOLVING CHECKLIST

Point Value		Evaluation
15	Identified the Problem	________
20	Gave Sufficient Thought to the Problem (Facts)	________
20	Identified Overall Objective	________
20	Considered Overall Objective	________
25	Recommended Solution to Problem	________
	TOTAL	

Assignment Sheet 1

Specific scripts will vary but should contain these elements:

1) Problem: Is this situation an "ordinary matter?"

Facts: Ms. Kirschner asked not to be bothered with routine matters.

Mr. Chung is responsible for routine.

You may not be able to reach Ms. Kirschner without a long delay anyway.

Objective: Smooth continuum of business operations

Alternatives: (1) Call Ms. Kirschner; leave a message to return the call if she is not available.

(2) Refer the problem to Mr. Chung.

(3) Refer situation to Mr. Chung for his recommendation with the option to confer via phone with Ms. Kirschner.

Recommendation: Option 3

2) Problem: Ms. Kirschner is not available.

Facts: Ms. Kirschner referred all routine matters to Mr. Chung.

Objective: Smooth business operation

Alternatives:

(1) Refer Mr. Whitworth to Mr. Chung.

(2) Offer to give Mr. Whitworth's brochures to Ms. Kirschner upon her return to the office.

(3) Offer to schedule an appointment for Mr. Whitworth with Ms. Kirschner following her return.

(4) Combination of the alternatives

Recommendation: Combination

3) Problem: Is this "urgent business" justification for interruption?

Facts: Ms. Kirschner gave instructions not to interrupt.

This client is important to the business.

Objective: Satisfying Ms. Kirschner AND the client

Alternatives:

(1) Interrupt Ms. Kirschner.

(2) Offer to schedule an appointment with Ms. Kirschner.

(3) Tell client that Ms. Kirschner is not available. Could anyone else help now? Ask if the client would like to wait until she is available or schedule an appointment for later.

Recommendation: Option 3

Assignment Sheet 2

Problem: What will you do in this situation?

Facts: The person who delegates responsibility continues to be responsible even if someone else does the work, thereby assuming partial responsibility.

Ron made the keying error and did not adequately verify the accuracy of his work.

Objective: Reestablishing your credibility/position with the department manager

Alternatives:

(1) Say nothing.

(2) Discuss the situation and your feelings with Ron.

(3) Approach your department manager jointly with Ron to discuss the error.

Recommendation: Combination of 2 and 3

Assignment Sheet 3

Problem: Personal relationship in potential conflict with business relationship

Facts: The personal friendship was established prior to the business relationship. Other members of the department may not know this or appreciate it.

Your friendship with Carla may subject both to criticism of your "playing favorites" or of Carla "pipelining" information to her boss.

Objective: Maintaining positive attitude within the department

Alternatives:

(1) Accept the lunch invitation and continue the friendship as usual.

(2) Decline the invitation and terminate the non-business relationship.

(3) Discuss concerns with Carla about potential problems and decline the invitation.

(4) Discuss concerns but accept the invitation.

Recommendation: Three or four depending upon other factors not specified in the case problem.

Assignment Sheet 4

Problem: Lack of productive communication with Mr. Chucalo

Facts: Erin and John enjoy their duties but not the criticism or attitude displayed by Mr. Chucalo.

Objective: Removing nonproductive stress from the working environment

Alternatives: (1) Terminate employment with Mr. Chucalo.

(2) Continue trying to tolerate the situation until Mr. Chucalo changes or until other job offers are received.

(3) Ask Mr. Chucalo to discuss the office situation and performance expectations openly without criticism or accusations.

Recommendation: Option 3 with statement that seeking other employment is an option and realizing that Mr. Chucalo might also terminate the employment of John and Erin.

POSTTEST

Directions: Use the five-step approach to solve this problem.

In your job search you have applied for multiple positions, some more appealing than others, and have now received two offers:

Job A contains some duties which you enjoy and some duties which you do not enjoy. The working hours are not what you had wanted but may potentially change to those that you do want. The pay is $.75 per hour above minimum wage with potential for increase periodically.

Job B contains all the duties you are seeking during the working hours that you prefer. The pay is minimum wage with no established policy for increase.

Unit XIII - Decision Making/Problem Solving
Lesson 1 - Case Problems

POSTTEST KEY

Five-Step Approach:

1. Problem: Which job is the one to accept?
2. Facts: Those listed plus ones supplied by each student
3. Objective: Selecting the job which best fits individual needs and career plan
4. Alternatives: Job A

   Job B

   Accept neither and continue looking.
5. Recommendation: Dependent upon individual

Evaluation: Is the student's recommendation consistent with his/her facts? His/her objective?

PROBLEM SOLVING CHECKLIST

Point Value		Evaluation
15	Identified the Problem	________
20	Gave Sufficient Thought to the Problem (Facts)	________
20	Identified Overall Objective	________
20	Considered Overall Objective	________
25	Recommended Solution to Problem	________
	TOTAL	________

LESSON OBJECTIVES

1. Given details of a business meeting, the student will prepare an agenda with 90 percent accuracy within 45 minutes.
2. Given notes about a two-day out-of-town business trip, the student will make a detailed list of the necessary arrangements with 90 percent accuracy within 30 minutes.
3. Given handwritten information concerning an out-of-town business trip, the student will prepare an itinerary with 90 percent accuracy within 50 minutes.
4. Given details concerning an emergency that arises in the office, the student will list specific measures for attending to the emergency with 90 percent accuracy within 15 minutes.
5. Given specific facts concerning a business meeting, the student will compose and prepare for mailing a cover letter to the Board of Directors of a company with 90 percent accuracy within 30 minutes.
6. Given the necessary information and form, the student will complete a check request with 90 percent accuracy within 10 minutes.
7. Given a handwritten speech with corrections, the student will type a mailable copy of the speech with 90 percent accuracy within 45 minutes.
8. Given details concerning an accident, the student will prepare a deposition to be signed by a witness and a notary with 90 percent accuracy within 30 minutes.
9. Given a news release on a transcribing machine, the student will prepare a mailable copy for release to the media with 90 percent accuracy within 30 minutes.
10. Given financial information concerning a business operation, the student will prepare a financial table showing gross and net receipts with 90 percent accuracy within 30 minutes.
11. Given dictated information regarding an announcement to be made to all office personnel, the student will prepare an interoffice memorandum in mailable form with 90 percent accuracy within 20 minutes.

SUGGESTED ACTIVITIES

I. Instructor

  A. Provide students with objectives and information sheets.

  B. Prepare tapes for interoffice memo and news release.

  C. Explain Tasks Simulation Project. Alert students to consider which tasks should be completed using a word processor.

  D. Assign Office Tasks Simulation Project.

  E. Give posttest.

II. Student

  A. Read and discuss objectives and information sheets.

  B. Complete Office Tasks Simulation Project.

  C. Take posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheet

II. Information Sheets

III. Assignment Sheet and Answers

  A. AS 1: Office Tasks Simulation

IV. Posttest and Key

INFORMATION SHEET

You are the secretary for Mrs. Janice King who is president of Physical Fitness Centers, Incorporated. The company became operational on January 5, 1979, and the headquarters are located at 2219 Golf Course Road, Kansas City, MO 64108. Currently, centers are located in Illinois, Oklahoma, Kansas, and Colorado. Two more branches will open on May 1 of this year; one in Kingsville, Texas; the other in Santa Fe, New Mexico.

Current Board of Directors for Physical Fitness Centers, Inc., include:

Mrs. Gene Martin
Martin, Gower, and Barnes
Attorneys at Law
145 Walnut
Kansas City, Missouri 64106

Dr. Charles Royce
Doctors Park Plaza
Suite #2, Summit Hills Road
Topeka, Kansas 66601

Mrs. Nancy Rodreguiez
Physical Therapy Department
Veterans Administration Hospital
1055 Clermont
Denver, Colorado 80220

Dr. Marilyn Streeter
Medical Arts Building
913 Kingston Drive
Kingsville, Texas 78363

Mr. Douglas Cunningham, President
Rowe Equipment Company
12191 Blackfoot Drive
Chicago, Illinois 60648

Mrs. Janice King, Chairperson
Board of Directors & President
Physical Fitness, Inc.
2291 Golf Course Road
Kansas City, Missouri 64108

ASSIGNMENT SHEET 1: Office Tasks Simulation

Directions: Prioritize the following jobs and complete the work. Mrs. King will be out of town for the next two days. Tuesday, January 15 and Wednesday, January 16.

Mrs. King and Jim Garcia, from the sales department, will be flying to Santa Fe, New Mexico, on Tuesday, February 2. Mrs. King wants a rental car available upon her arrival in Santa Fe. Make a detailed "To Do" list of the arrangements needed for the Santa Fe trip. Prepare an itinerary for the trip and make an extra copy to be given to Mrs. King's husband.

On Wednesday at 10:30 a.m., a water pipe breaks in Mrs. King's office. The carpet is saturated with water and some supplies are ruined. Make a list of sequential procedures that you would follow to meet this crisis.

The board of directors will meet next Monday. The handwritten agenda that Mrs. King left must be typed and mailed to each board member so that he/she will receive a copy before the meeting.

An interoffice memo must be prepared for distribution to all office personnel in the Kansas City office and a copy sent to each of the directors at the 16 centers that are now in operation in other cities.

Mrs. King wants to issue a news release about the opening of the new centers. Prepare the news release.

The speech that Mrs. King has been asked to give to a group of young executives needs to be typed. The speech will be given after a luncheon at the Downtown Athletic Club in Kansas City on January 25. Type the speech so that deletions, additions, and corrections can be made.

Mrs. King wants to present a short financial report to the board of directors on Monday. Prepare the report in the proper form.

Mrs. King has approved a contribution to the United Way Agency of Greater Kansas City. She wants to give 10 percent more than the $500 contributed last year. Prepare a check request.

Prepare a deposition for Mrs. King's signature regarding the accident she witnessed on June 6.

A cover letter needs to be composed and typed to send with the materials being mailed to the board of directors about the 9 a.m. meeting in the Board room.

OFFICE TASKS: Itinerary

Information Regarding Santa Fe Trip

Tuesday, Feb 2

Leave Kansas City International on Eastern Flight 107 at 2 pm. Arrive at Santa Fe Airport at 4:57 p.m. Pick-up car at ABC Rental.

Wednesday, Feb. 3

Bkfst -- hotel 6:30. Lunch at Downtown Athletic Club at 12 noon -- 1:30 meet with decorator at Physical Fitness Center #505-789-1234. 8 am meet with personnel of Center. 10:30 meet with bank officials to finalize financing ~~arrange financing~~ details of new Center. 3 pm start training session for new sales staff. 5 pm exercise at Downtown Athletic Club. Need dinner reservations for 6 at 8 pm at the Santa Fe Theater. Need room reservation at hotel for sales staff meeting.

Thursday, Feb. 4

Bkfst with Tom Holt, director of Santa Fe facility at 6:30 in hotel dining room. Room to train sales staff from 8-11:30 am. 5:30 pm exercise at Downtown Athletic Club -- 12:30 lunch 6:30 pm dinner with Garcia and director of fitness Center -- 1:30 to 4:30 pm training sales staff in Room ——.

Friday, Feb. 5

6 am. bkfst with Garcia in hotel dining room -- 8:30-10:30 final training session for Sales staff in hotel Room ——. 11 to 11:30 final meeting with all personnel at new fitness Center. 12 noon lunch, return car, back ~~to KC~~ home on Eastern Flight 219, which leaves at 2:15 pm. and arrives at 5:13 p.m.

OFFICE TASKS: Agenda For Board of Directors Meeting

B of D
Agenda for DB Meeting

I Call to order

II Minutes of the last meeting

III Discussion of Opening New Center in
    Kingsville, Texas
  1. Size of facility
  2. Loan for new facility
  3. Personnel hired for new facility
  4. Equipment for new facility

III Discussion of opening new Center in
    Santa Fe, New Mexico
  1. Size of facility
  2. Equipment for new facility
  3. Zoning ordinance
  4. Loan for new facility
  5. Personnel hired for new facility

IV Strategy for recruiting new members

V Introduction of new members (Make this III)

VI Discussion of last year's financial report

7. Adjournment

Unit XIII - Decision Making/Problem Solving
Lesson 2 - Office Tasks Simulation

OFFICE TASKS: Speech to be Given by Mrs. King

Dealing with Stress and Conflict
~~Stress~~ Management

¶ Stress or tension is often brought about by change in our lives. Sometimes the decisions that we have to make or the problems that we must solve cause us to experience stress. If we do not find some way to handle these ~~stressful~~ stressful situations, it can eventually produce emotional or physical illness.

(DS)

¶ The emotional factors that are often involved in stress are~~s~~:

1. fear
~~2.~~3 anger
~~3.~~4 frustration
~~4.~~5 impatience
~~5.~~2 anxiety

The experience you have when engaged in problem solving and decision making will affect how you handle situations in the future. For instance, let's suppose that you go shopping for a new outfit of clothing. After you make your selections, the Clerk enters your purchases into the cash register and tell you the total is $350. When you open your Checkbook to write a Check, you discover that you are out of blank checks. By this time you are beginning to feel stress from the situation. Not only has the clerk made the entry into the cash register and waiting for you to pay, but other people are also waiting with their purchases. The next time you decide to go shopping, it is very probable that you will determine that you have an ample supply of checks to pay for your purchases.

DS

How Does One Deal With Stress?

The best way to deal with stress is to recognize the options. There may be instances where you cannot possibly avoid change. If it is inevitable, don't worry about it. If you can't change a situation, choose an alternative~~ly~~. Once you have chosen a new plan you can center all your energies and concentration on that given activity; thus, relieving the stress you felt from the disappointment. (Use example of high school student and principal)

DS

A major cause of stress is conflict which can be either internal or external. Internal conflict will deal with your personal beliefs; external with individuals whose ideas are different from your own.

DS

Conflicts can be divided into four groups.

1. Internal conflicts – These remain within an individual. They deal with one's value system and conduct in deciding what is right and wrong. Deciding whether to wear a white or cream

colored jacket is a relatively simple internal conflict. We make these decisions every day and they cause very little stress. (~~Ins~~ Example of driving down the highway)

2. A second type of conflict is subdued conflict. This method deals with conflicts between people and no one talks about the problem. It may be that you do not like what someone says or does but in order to avoid an argument, nothing is said. Some people can forget these kinds of incidents as soon as they happen, others let the situation build inwardly until an unhealthy situation develops. Eventually, you have to deal with the situation to relieve the stress.
(Insert Psychiatrist story)

3. The third kind of conflict is group conflict. When several people are on each side of a disagreement, group conflict results. ~~They~~ ~~Can be~~ They can either be healthy or unhealthy. We've all heard the statement, there is safety in numbers and it is always nice to have friends on your side. On the other hand, you can & lose control of a situation when you have group conflict. You can become involved in some activities that are against your value standards.

4. The fourth and last kind of conflict that we will discuss today is societal conflict. This kind of conflict involves large groups of people. Competition between nations or political parties are good examples of societal conflict. Usually we as individuals leave these kinds of decisions to the legislative system.
(Insert Involvement Crisis)

How Do We Deal With Conflict?

The first step in dealing with conflict is to ~~determin~~ determine what is causing the conflict. Secondly, analyze the situation and be sure you understand the alternatives. Remember, you may be incorrect in the position you have taken, so be sure you are not the one keeping the conflict from ~~Going~~ being resolved.

After you have analyzed the problem, make a decision as to how you are going to deal with the issue. As soon as you have made your decision, prepare for implementation of your plan, and through feedback you can determ~~ing~~e if your plan is working. If the plan doesnt work, seek another alternative and proceed again.

If you are dealing with conflict in a group, one of the best ways to achieve results is ~~thru~~ through the debate process. Debate provides a vehicle through which understanding can take place. It also provides the opportunity to test ideas.

We in the physical fitness business believe That one of the best ways to relieve stress and tension is through exercise of the body. A short work out ~~each~~ every day or a prolonged exercise period three times a week can do wonders in relieving stress and tension. Just as the mind needs exercise to keep it functioning properly, so does the body.

(Use ending from speech given at ~~Lions Club~~ Rotary last month)

OFFICE TASKS: Yearly Financial Report

Physical Fitness Centers, Inc.
Kansas City, Missouri
December 31, 19—

	Gross Receipts	Net Receipts
Springfield, Illinois (2 centers)	$ 526,000	$ 110,511
Tulsa, Oklahoma (4 centers)	1,526,321	500,723
Topeka, Kansas (1 center)	200,000	100,396
Steamboat Springs, Colorado (1 center)	75,000	25,951
Denver, Colorado (2 centers)	750,000 ~~750,000~~	350,261
Kansas City, Missouri (4 centers	1,623,201	750,756
St. Louis, Missouri (2 centers)	896,200	632,231

OFFICE TASKS: Check Request

CHECK REQUEST

Date of Request ________________________________

Requested By ________________________________

Department ________________________________

Amount ________________________________

Date Needed ________________________________

Payable To ________________________________

Address ________________________________

For ________________________________

Return To ________________________________

Approved By ________________________________

Account Charged ________________________________

OFFICE TASKS: News Release Tape

Directions: Ask your instructor for the news release tape. Follow the directions given on the tape. Determine punctuation and paragraphing.

SCRIPT - News Release Tape (to be taped by the instructor)

This is a tape to be transcribed for the Decision Making/Problem Solving Unit. It contains a news release that Mrs. King has prepared for the media. Paragraphs and punctuation will not be included in the dictation.

The Physical Fitness Centers, Incorporated is located at 2219 Golf Course Road, Kansas City, Missouri 64108. The telephone number is 816-231-4213.

The information is to be released on receipt and is prepared on January 21.

At the regular stockholders meeting in Kansas City Missouri president Janice King announced that May 1 will be the scheduled date for the opening of two new physical fitness centers--one in Kingsville Texas and one in Santa Fe New Mexico. King announced that the two facilities would be furnished with equipment similar to the centers that are now operational in cities throughout Missouri Kansas Oklahoma Illinois and Colorado. Mrs. Peggy Greene that's spelled G R E E N E will head the sales staff for the Texas facility and Mr. Jim Garcia will assume responsibility for memberships at the New Mexico Center. Both will assume their new responsibilities on March 1. King also announced that the company will expand into four other states during the next two years. She stated that the company increased profits during the past year by 37 percent and it hopes to sustain this rate of growth annually during the next five years. Stockholders reacted favorably to King's announcement.

OFFICE TASKS: Interoffice Memo

Directions: Ask your instructor for the interoffice memo tape. Follow the directions given on the tape. Determine punctuation and paragraphing.

SCRIPT - Interoffice Memo Tape (to be taped by the instructor)

This is a tape to be transcribed for the Decision Making/Problem Solving Unit. Paragraphs and punctuation will not be included in the dictation. The interoffice memo is to all office personnel from Janice King and the subject is the opening of facilities in Texas and New Mexico.

We are now formulating plans for new centers in Kingsville Texas and Santa Fe New Mexico which will open on May 1, 19__. Naturally one of the top priorities will be to recruit as many new members for the centers as possible. Effective March 1 Peggy Greene will become head of our sales department for the Texas facility and Jim Garcia will head the sales campaign in Santa Fe. Both of these people are interested in obtaining possible recruits for membership before the facilities open. Any contacts you have in these areas should be passed along to Ms. Greene or Mr. Garcia. Any information or help you can give them will be appreciated.

OFFICE TASKS: Deposition

Directions: Using a current resource book, prepare a deposition for Mrs. King that must be notarized. Here are the details:

One June 6, 19__, Mrs. King was a witness to an accident which occurred in the 3000 block of North Park Avenue, Kansas City, Missouri. Geraldine Turner was injured in the accident which was caused by a tree limb which had fallen into the street after the Hawkins Tree Trimming Company had completed work in the area.

The notary's commission expires on August 15, 19__.

ANSWERS TO PRIORITIZING OFFICE TASKS SIMULATION (answers will vary)

1. Prepare a "To Do" list for Santa Fe Trip and make all reservations immediately.
2. Type handwritten agenda for Board of Directors meeting.
3. Compose a cover letter and send with the agenda to each board member.
4. Prepare the news release to be issued after the Board of Directors meeting. The release should be dated January 21.
5. Prepare financial report for Board of Directors meeting.
6. On Wednesday morning at 10:30 a.m. give top priority to the water pipe situation.
7. Prepare an interoffice memo announcing the opening of 2 new centers.
8. Enter the speech on the word processor and print out a copy for Mrs. King. (Be sure to store the material for deletions, additions and corrections.)
9. Prepare the deposition for Mrs. King to sign and have notarized.
10. Complete check request for donation to United Way.
11. Type itinerary for the King/Garcia trip.

ANSWERS FOR PREPARING A "TO DO" LIST (answers will vary)

---

1. Call airlines and arrange flight to arrive in Santa Fe by 5 p.m. on February 2 and return on February 5, leaving Santa Fe after 1:30 p.m.

2. Make single room reservations for King and Garcia for nights of February 2, 3, and 4. Also arrange for meeting rooms in hotel for 4 to 4:30 p.m. on February 3; 8 to 11:30 a.m. on February 4; 1:30 to 4:30 p.m. on February 4; and 8:30 to 10:30 a.m. on February 5.

3. Call Downtown Athletic Club and make 6:30 p.m. dinner reservations for February 2, luncheon reservation for February 3, and 5 p.m. reservations for exercise room on February 3 and 5:30 p.m. on February 4.

4. Call fitness center director (505-123-8914) in Santa Fe and confirm meeting to be held on site at 8 a.m. on February 3, and 8:30 to 10:30 a.m. on February 5.

5. Make dinner reservations for six people at Santa Fe Dinner Theater.

6. Call Tom Holt, director of new fitness center in Santa Fe and confirm 6:30 dinner meeting in hotel dining room for February 4, 1:40 p.m. meeting on February 3, and breakfast meeting in hotel dining room at 6:30 on February 4.

7. Call car rental in Santa Fe and arrange for car to be picked up after 5 p.m. on February 2 and turned back at 2 p.m. on February 5. (This could be done through the airlines.)

8. Call decorator in Santa Fe and confirm 1:30 p.m. meeting at fitness center on February 3.

9. Make appointment to meet with bank officials in Santa Fe at 10:30 a.m. on February 3.

ANSWERS FOR AGENDA FOR BOARD OF DIRECTORS MEETING

PHYSICAL FITNESS CENTERS INCORPORATED

AGENDA FOR BOARD OF DIRECTORS MEETING

January 21, 19__

I. Call to Order

II. Minutes of Last Meeting

III. Introduction of New Members

IV. Discussion of Opening New Center in Kingsville, Texas

    Size of Facility

    Loan for New Facility

    Personnel Hired for New Facility

    Equipment for New Facility

V. Discussion of Opening New Center in Santa Fe, New Mexico

    Size of Facility

    Equipment for New Facility

    Loan for New Facility

    Personnel Hired for New Facility

    Zoning Ordinance

VI. Strategy for Recruiting New Members

VII. Discussion of Last Year's Financial Report

VIII. Adjournment

SUGGESTED COVER LETTER FOR BOARD OF DIRECTORS MEETING

Date

Mrs. Gene Martin
Martin, Gower, and Barnes
Attorneys at Law
145 Walnut
Kansas City, MO 64106

Dear Mrs. Martin:

The meeting of the Board of Directors for Physical Fitness Centers, Inc., will meet at 9 a.m. in the Board Room of the headquarters building in Kansas City, Missouri, on Monday, January 21. Enclosed is an agenda for that meeting.

Should you have questions regarding the meeting or need any specific information, feel free to write or call this office.

Sincerely,

(Your Name)
Secretary to Mrs. Janice King

Enclosure

NOTE: Letters will vary but should contain the time, date, and place of the meeting. The letter and agenda should be sent to every board member. Students should use a word processor on this assignment if the software and the equipment are available.

ANSWERS TO THE NEWS RELEASE TAPE

PHYSICAL FITNESS CENTERS, INC.
2219 Golf Course Road
Kansas City, Missouri 64108
(816) 231-4213

RELEASE
ON RECEIPT

Kansas City, January 21--At the regular stockholders meeting in Kansas City, Missouri, President Janice King announced that May 1 will be the scheduled date for the opening of two new physical fitness centers--one in Kingsville, Texas, and one in Santa Fe, New Mexico. King announced that the two facilities will be furnished with equipment similar to the centers that are now operational in cities throughout Missouri, Kansas, Oklahoma, Illinois, and Colorado.

Mrs. Peggy Greene will head the sales staff for the Texas facility and Mr. Jim Garcia will assume responsibility for memberships at the New Mexico center. Both will assume their new responsibilities on March 1.

King also announced that the company will expand into four other states during the next two years. She stated that the company increased profits during the past year by 37 percent and it hopes to sustain this rate of growth annually during the next five years. Stockholders reacted favorably to King's announcement.

Janice King

URS

ANSWERS TO YEARLY FINANCIAL REPORT

PHYSICAL FITNESS CENTERS, INCORPORATED

Kansas City, Missouri

December 31, 19__

	Gross Receipts	Net Receipts
Springfield, Illinois (2 centers)	$ 526,000	$ 110,512
Tulsa, Oklahoma (4 centers)	1,526,321	500,723
Topeka, Kansas (1 center)	200,000	100,396
Steamboat Springs, Colorado (1 center)	75,000	25,951
Denver, Colorado (2 centers)	750,000	350,261
Kansas City, Missouri (4 centers)	1,623,201	750,756
St. Louis, Missouri (2 centers)	896,200	632,231
Totals	$5,596,722	$2,470,830

378

ANSWERS TO EMERGENCY TASK: WATER PIPE BREAKAGE (answers will vary)

1. Turn off water
2. Call building maintenance and/or plumber
3. Relocate undamaged supplies and furniture
4. Determine which items can be salvaged
5. Discard expendable items
6. Call insurance company
7. Call carpet cleaning company

ANSWER TO INTEROFFICE MEMO TAPE

TO: ALL OFFICE PERSONNEL

FROM: Janice King, President

DATE:

SUBJECT: Opening of Facilities in Texas and New Mexico

We are now formulating plans for new centers in Kingsville, Texas, and Santa Fe, New Mexico, which will open on May 1, 19__. Naturally, one of the top priorities will be to recruit as many new members for the centers as possible.

Effective March 1, Peggy Greene will become head of our sales department for the Texas facility and Jim Garcia will head the sales campaign in Santa Fe. Both of these people are interested in obtaining possible recruits for membership before the facilities open. Any contacts you have in these areas should be passed along to Ms. Greene or Mr. Garcia. Any information or help you can give them will be appreciated.

URS

ANSWER FOR SPEECH TO BE GIVEN BY MRS. KING

STRESS MANAGEMENT

Stress or tension is often brought about by change in our lives. Sometimes the decisions that we have to make or the problems that we must solve cause us to experience stress. If we do not find some way to handle these stressful situations, it can eventually produce emotional or physical illness.

The emotional factors that are often involved in stress are:

1. fear
2. anxiety
3. frustration
4. impatience
5. anger

The experience you have when engaged in problem solving and decision making will affect how you handle situations in the future. For instance, let's suppose that you go shopping for a new outfit of clothing. After you make your selections, the clerk enters your purchases into the cash register and tells you the total is $350. When you open your checkbook to write a check, you discover that you are out of blank checks. By this time you are beginning to feel stress from the situation. Not only has the clerk made the entry into the cash register and waiting for you to pay her, but other people are also waiting with their purchases. The next time you decide to go shopping, it is very probable that you will determine that you have an ample supply of checks to pay for your purchases.

How Does One Deal With Stress?

The best way to deal with stress is to recognize the options. There may be instances where you cannot possibly avoid change. If it is inevitable, don't worry about it. If you can't change a situation, choose an alternative. Once you have chosen a new plan you can center all your energies and concentration on that given activity; thus, relieving the stress you felt from the disappointment.

(GIVE EXAMPLE OF HIGH SCHOOL STUDENT AND PRINCIPAL)

A major cause of stress is conflict which can be either internal or external. Internal conflict will deal with your personal beliefs; external with individuals whose ideas are different from your own.

Conflicts can be divided into four groups.

1. Internal conflicts--These remain within an individual. They deal with one's value system and conduct in deciding what is right and wrong. Deciding whether to wear a white or cream colored jacket is a relatively simple internal conflict. We make these decisions every day and they cause very little stress.

(EXAMPLE OF DRIVING DOWN THE HIGHWAY)

2. A second type of conflict is subdued conflict. This method deals with conflicts between people and no one talks about the problem. It may be that you do not like what someone says or does but in order to avoid an argument, nothing is said. Some people can forget these kinds of incidents as soon as they happen, others let the situation build inwardly until an unhealthy situation develops. Eventually, you have to deal with the situation to relieve the stress.

(INSERT PSYCHIATRIST STORY)

3. The third kind of conflict is group conflict. When several people are on each side of a disagreement, group conflict results. They can either be healthy or unhealthy. We've all heard the statements, "there is safety in numbers" and "it is always nice to have friends on your side". On the other hand, you can lose control of a situation when you have group conflict. You can become involved in some activities that are against your value standards.

4. The fourth and last kind of conflict that we will discuss today is societal conflict. This kind of conflict involves large groups of people. Competition between nations or political parties is a good example of societal conflict. Usually we as individuals leave these kinds of decisions to the legislative system.

(INSERT INVOLVEMENT CRISIS)

How Do We Deal With Conflict?

The first step in dealing with conflict is to determine what is causing the conflict. Secondly, analyze the situation and be sure you understand the alternatives. Remember, you may be incorrect in the position you have taken, so be sure you are not the one keeping the conflict from being resolved.

After you have analyzed the problem, make a decision as to how you are going to deal with the issue. As soon as you have made your decision, prepare for implementation of your plan, and through feedback you can determine if your plan is working. If the plan doesn't work, seek another alternative and proceed again.

If you are dealing with conflict in a group, one of the best ways to achieve results is through the debate process. Debate provides a vehicle through which understanding can take place. It also provides the opportunity to test ideas.

We in the physical fitness business believe that one of the best ways to relieve stress and tension is through exercise of the body. A short workout every day or a prolonged exercise period three times a week can do wonders in relieving stress and tension. Just as the mind needs exercise to keep it functioning properly, so does the body.

(USE ENDING FROM SPEECH GIVEN AT ROTARY LAST MONTH)

NOTE: Students should use word processor for this assignment if the software and/or the equipment are available.

ANSWER FOR DEPOSITION

(2 inch top margin)

DEPOSITION

STATE OF MISSOURI)

) ss.

County of Jackson)

Before me, the subscriber, a notary public for the County of Jackson, State of Missouri, personally appeared Janice King of Kansas City, Jackson County, Missouri, who being duly sworn deposes and says that

(1) she has been an employee of Physical Fitness Centers, Inc., at 2291 Golf Course Road, Kansas City, Missouri, since January 5, 1979.

(2) on June 6 of last year she witnessed an accident which befell Geraldine Turner in the 3000 block of North Park Avenue, Kansas City, Missouri.

(3) that the accident was caused by a tree limb that had been left in the street after the Hawkins Tree Trimming Company had completed work in the area and through no fault of Geraldine Turner.

___________________________________(L.S.)

(name), Notary Public

My commission expires August 15, 19__.

ANSWERS TO CHECK REQUEST

CHECK REQUEST

Date of Request	January, 19--
Requested By	Janice King
Department	Executive (answer could vary)
Amount	$550
Date Needed	ASAP (answer could vary)
Payable To	United Way Agency of Greater Kansas City
Address	Kansas City, Missouri
For	Donation
Return To	Janice King, President
Approved By	Janice King
Account Charged	Charity (asnwer could vary)

ANSWERS FOR ITINERARY OF MRS. KING (Answers will vary.)

ITINERARY OF MRS. JANICE KING

February 2-5

Santa Fe, New Mexico

Tuesday, February 2

2:00 p.m.	Leave Kansas City International on Eastern Flight 107 (Tickets in travel folder)
4:57 p.m.	Arrive at Santa Fe Airport (pick up car at ABC rental)
5:30-6:00 p.m.	Check in ____________________ Hotel
6:30 p.m.	Dinner with Garcia at Downtown Athletic Club (505-123-4567)

Wednesday, February 3

6:30 a.m.	Breakfast in hotel dining room
8:00 a.m.	Meet with all personnel at Santa Fe Center (505-789-1234)
10:30 a.m.	Meet with bank officials
12:00 Noon	Lunch at Downtown Athletic Club (reservations have been made)
1:30 p.m.	Meet with decorator at Fitness Center
3:00 p.m.	Training for sales staff in ______________ Room of hotel
5:00 p.m.	Exercise at Downtown Athletic Club
8:00 p.m.	Dinner at Santa Fe Theater (reservations for 6)

Thursday, February 4

6:30 a.m.	Breakfast with director of center and Garcia in hotel dining room
8-11:30 a.m.	Second session for training sales staff, _______________ Room of hotel
12:30 p.m.	Lunch in hotel dining room

1:30-4:30 p.m.	Third session for training sales staff, _______________ Room of hotel
5:30 p.m.	Exercise at Downtown Athletic Club
6:30 p.m.	Dinner with Garcia and Holt in hotel dining room

Friday, February 5

6:00 a.m.	Breakfast with Garcia in hotel dining room
8:30-10:30 a.m.	Final training session for sales staff, _______________ Room of hotel
11-11:30 a.m.	Final meeting will ALL personnel at New Fitness Center
12:00 Noon	Lunch
1:30 p.m.	Return car to rental agency
2:15 p.m.	Leave Santa Fe on Eastern Flight 219. Arrive K.C. 5:13 p.m.

POSTTEST

Directions: You are the secretary for Mr. Stanley Gray, President of Gray Associates, a small public relations firm that employs 48 people. On Monday, January 28, 19__, at 5 p.m., Mr. Gray leaves the office for a three-day meeting in a town 50 miles away. The following tasks are to be completed. Prioritize them according to the urgency of the situation and write an explanation for your answer.

1. Compose a letter of appreciation and send to the president of the United Central Bank thanking him for speaking at a luncheon which Mr. Gray organized last Thursday.
2. Prepare the minutes of the Board of Directors meeting which was held last week and send a copy to each member.
3. Compose and prepare an interoffice memo announcing the staff Valentine Party to be held on February 14.
4. You receive a telephone call at 9 a.m. on Tuesday from the Dawson Printing Company saying that a bill for $41,395 is a month overdue and unless it is paid within the next 10 days it will be turned over to a collection agency.
5. A telephone call is received at 10:30 a.m. on Tuesday morning from the ABC equipment company telling you that they are discontinuing the model of word processing equipment that you have in your office. Also, they will not be able to furnish maintenance on the machine you have after June 1. They will be able to offer an "outstanding" deal on a trade-in but in order to take advantage of the offer, a decision must reach their office by 5 p.m. on Thursday afternoon.
6. A telephone call is received at 1:30 on Wednesday afternoon from the nurse at one of the local grade schools. Mr. Gray's 10 year old son has become ill and needs to be picked up at the school. None of the family members can be reached.
7. Mr. Gray is traveling to Springfield by car on February 3 to make a motivational speech at a dinner meeting at 6:30 p.m. at the University Plaza Hotel. He will spend the night and travel to Bolivar the next morning for a 10 a.m. meeting. Make the necessary arrangements.
8. Five hundred brochures arrive on Tuesday and need to be processed for mailing to prospective customers of Gray Associates.
9. Mr. Gray calls you at 10 a.m. on Wednesday and says that he needs an important document (which is locked in the vault) delivered to him by 2 p.m. on Thursday.

10. A contract between Mrs. Alice Jameson and Gray Associates must be prepared and received by Mrs. Jameson by February 4 of this year.

11. Gray Associates is planning an open house at their facility on March 15. Mr. Gray has asked you to compose a possible guest list of 300 people, select the style of invitation and compose the message that will be sent.

SUGGESTED ANSWERS TO POSTTEST (answers will vary)

1. Write a letter to the bank president. (Thank you letters should be sent ASAP after a presentation. One-week delay is too long. This task needs to be taken care of immediately.)

2. Type Jameson and Gray Associates contract. (The contract has to be mailed to Mrs. Jameson, and she needs to receive it in the next few days.)

3. Gather all the information regarding the overdue account at Dawson Printing Company and leave it along with a message marked URGENT on Mr. Gray's desk. (If Mr. Gray calls the office you can tell him about this matter and you need all the information available.)

4. Prepare minutes of Board of Directors meeting and send a copy to each member. (If the board meeting was held last week it is time to transcribe the minutes and send a copy to each board member.)

5. Write a message regarding the trade-in policy on the word processor in the office and leave it on Mr. Gray's desk. (If Mr. Gray calls the office you can mention this matter to him and a message needs to be written as soon as the call is received so the information will be accurate.)

6. Prepare an interoffice memo announcing the Valentine Office Party. (Staff members will need to get this date on their calendar as soon as possible; therefore, to insure good attendance the memo needs to go out.)

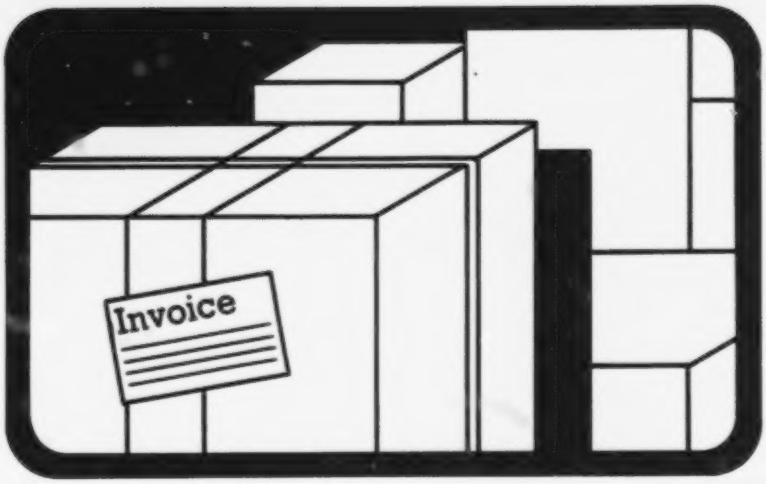
7. Mr. Gray's call about the document he needs for the meeting should take priority over everything. At 10:30 a.m. on Wednesday determine the cheapest and quickest way to get the requested document to him at his meeting 50 miles away. (At 10:30 a.m. on Wednesday, this task needs to take priority over everything.)

8. Start work on the open house guest list and invitations. (Planning for the open house invitations is not urgent but needs to be started if there is time to do so.)

9. When the call comes about Mr. Gray's son at 1:30 p.m. on Wednesday, make arrangements to pick him up at school and bring him to the office until a family member can be located. (A school is no place for a sick child, he needs to be picked up immediately.)

10. Type Mr. Gray's speech. (This is not top priority, but should be completed before Mr. Gray returns.)

11. Start processing the 500 brochures that are to be mailed. (Not a top priority item now, but work should be done on the brochures as time permits.)



Performing Product-To-Client Transactions

UNIT OBJECTIVE

After completing this unit, the student will be familiar with those forms associated with purchasing, selling, maintaining inventory, shipping and receiving. Also, the student will be able to define terms related to these functions and will be able to explain the flow of work as these functions are performed.

LESSON OBJECTIVES

1. Given a list of 10 terms and definitions, the student will match the terms with their correct definitions with 90 percent accuracy within 10 minutes.

2. Upon completion of this unit, the student will list the correct order of the 8 product-to-client transactions with 100 percent accuracy within 10 minutes.

3. Given a blank invoice, purchase order, purchase requisition, statement, credit memorandum, and appropriate information, the student will complete a mailable copy of each form within 60 minutes.

4. Upon completion of this unit, the student will identify 3 types of discounts with 100 percent accuracy within 5 minutes.

5. Upon completion of this unit, the student will list at least 4 types of carriers with 100 percent accuracy within 5 minutes.

6. Upon completion of this unit, the student will explain the difference between perpetual and periodic inventory systems with 100 percent accuracy within 10 minutes.

COMPETENCIES

1. Describe the sequence of product-to-client transactions
2. Complete transaction forms such as invoices, statements, and credit memoranda
3. Identify types of discounts
4. Identify types of carriers
5. Compare perpetual and periodic inventory systems

REFERENCES

I. Books and Pamphlets

A. Luke, Cheryl M. and Steigler, C. B. Office Systems and Procedures. Boston: Houghton Mifflin Co., 1982, pp. 521-541.

B. Pasewark, William R. and Olivero, Mary Ellen. Procedures for the Modern Office, 7th Edition. Cincinnati: Southwestern Publishing Co., 1983, pp. 460-525.

II. Software*

*Software descriptions

A. Business Education Volume 3--Accounting, St. Paul: Minnesota Educational Computing Consortium. For: Apple II.

This software contains a prepared set of account vendors, outstanding vouchers, customers, outstanding invoices, and inventory items for a hypothetical company. Equipment requirements include a dual disk drive and a 132-character printer. Available from MECC, 3490 Lexington Avenue North, St. Paul, MN 55112.

B. Business Inventory Manager. Business Applications, New York: McGraw-Hill Book Company, 1984. For: IBM PC; TRS-80 III; Apple II; II+; IIe.

One of five programs in a series, this program gives users help in areas often vital to success. Each program saves time by handling quickly--and accurately--what takes hours or days manually. Available from McGraw-Hill Book Company, Computer Marketing Services S-1, Princeton-Hightstown Road, Hightstown, NJ 08520.

C. Financial Cookbook, Cincinnati: South-Western Publishing Company. For: Apple II; IIe, IIe; II+; IBM PC; XT; PC jr; Commodore 64.

This package utilizes an easy-to-use, time-saving format that facilitates quick and accurate calculations for projecting mortgages, loans, investments, and buy-or-rent comparisons from basic inputs. It is organized into 30 basic financial questions (such as inflationary effects on income, saving to meet monetary goals, IRAs, insurance, etc.). Students choose the question that they want answered and the program provides a template to be filled in with the student's own data. It then computes an answer completely customized to consider individual tax implications, expected inflation, income, and more. Available from South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

D. Inventory Control and Budgeting Program, Eugene, OR: Abraxas Films, 1984. For Apple II+; IIe; IIc.

This software requires 40 column display, 80 column printer, and one disk drive. Menu selections include: inventory purchases, deductions, and count sheet; single items record, complete inventory report, budget report, definition of categories, and budget subtotal report by category. Available from Abraxas Films, P.O. Box 1416, Eugene, OR 97440.

E. Schmidt, Mary Agnes, Calculating Depreciation, Bad Debts, and Inventory. Computer-Assisted Accounting Principles, Amarillo, Texas: GB CAI Enterprises, 1985. For Apple IIe.

This is unit 17 in a series of 18. This unit includes 25 assignments, each consisting of a drill and practice and an analysis of proficiency of each objective. A printed copy of the lesson analysis for the instructor is available with printer. Available from GB CAI Enterprises, 3704 Farwell Drive, Amarillo, TX 79109.

F. Schmidt, Mary Agnes, Maintaining the Accounts Payable Ledger. Computer-Assisted Accounting Principles, Amarillo, Texas: GB CAI Enterprises, 1985. For Apple IIe.

This is unit 12 in a series of 18. This unit includes two assignments, each consisting of a drill and practice and an analysis of proficiency for each objective. A printed copy of the lesson analysis for the instructor is available with printer. Available from GB CAI Enterprises, 3704 Farwell Drive, Amarillo, TX 79109.

G. Schmidt, Mary Agnes, Maintaining the Accounts Receivable Ledger. Computer-Assisted Accounting principles, Amarillo, Texas: GB CAI Enterprises, 1985. For Apple IIe.

This is unit 10 in a series of 18. This unit includes two assignments, each consisting of a drill and practice and an analysis of proficiency for each objective. A printed copy of the lesson analysis for the instructor is available with printer. Available from GB CAI Enterprises, 3704 Farwell Drive, Amarillo, TX 79109.

H. Schmidt, Mary Agnes, Maintaining the Purchases Journal. Computer-Assisted Accounting Principles, Amarillo, Texas: GB CAI Enterprises, 1985. For Apple IIe.

This is unit 11 in a series of 18. This unit includes four assignments, each consisting of a drill and practice and an analysis of proficiency of each objective. A printed copy of the lesson analysis for the instructor is available with printer. Available from GB CAI Enterprises, 3704 Farwell Drive, Amarillo, TX 79109.

I. Schmidt, Mary Agnes, Maintaining the Sales Journal. Computer-Assisted Accounting Principles, Amarillo, Texas: GB CAI Enterprises, 1985. For Apple IIe.

This is unit 9 in a series of 18. This unit includes three assignments, each consisting of a drill and practice and an analysis of proficiency for each objective. A printed copy of the lesson analysis for the instructor is available with printer. Available from GB CAI Enterprises, 3704 Farwell Drive, Amarillo, TX 79109.

J. Skidmore, Richard, Accounts Payable, Palmdale, CA: Soft Data, 1983. For Apple IIe; II+; IIc; TRS-80 III and IV.

This is an accounting feature to interface with the General Ledger. Reports include Vendor File, Accounts Payable, Transaction Register, Cash Requirements and Aging. Available from Soft Data, P.O. Box 358, Palmdale, CA 93550.

K. Skidmore, Richard, Inventory Control, Palmdale, CA: Soft Data, 1983. For Apple IIe; II+; IIc; TRS-80 III and IV.

Inventory Control is an important priority for every business that has to maintain an investment budget, or meet customer demands. For production assets, a schedule of value-life is produced on demand with update. For production units, the inventory control program records inventory levels and value and determines reorder points. Available from Soft Data, P.O. Box 358, Palmdale, CA 93550.

L. Taylor, Williamson, and Milam, The Computerized Billing Clerk--Acme Electric Company, Cincinnati: South-Western Publishing Company, 1984. For TRS-80 III; IV; Apple II+; IIe.

This program simulates the duties of a billing clerk in an electric company: computing and adjusting bills and resolving human relations problems. Available from South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45277.

M. Teaching Accounting on the Computer, St. Paul, Minn.: Minnesota Educational Computing Consortium. For: Apple II.

For advanced accounting students, this software provides automated accounting systems for the general ledger system, the accounts payable system, the accounts receivable system, and the inventory control system. These systems are modular and can be used or introduced one at a time. Using prepared forms, students carry out a series of simulated business projects. Available from Teaching Aids Incorporated, P.O. Box 1798, Cosa Mesa, CA 929628-0798.

III. Flow-of-Work Simulations Review

Many instructors in clerical-secretarial courses make use of flow-of-work simulations. These simulations are a natural capstone to the curriculum since they, better than any other one study, replicate the work of an entire enterprise. After development of skills in keying, machine use, office procedures, etc., simulations provide an opportunity for the student to interact with classmates (co-workers) in actual production. A flow-of-work simulation tests not only the productivity of one student, but the efficiency of the class as a group. Each student can experiment to find the work area which best suits his/her skills. In addition, students are able to apply their abilities in human relations as they experience the frustrations caused by other students' delays, absences, and errors. All those hints and pleas from the instructor to work efficiently, to proofread, to be dependable, finally take on real meaning!

This review derives largely from publishers' descriptions. It is not meant to be an endorsement of any simulation. Rather, it is an attempt to provide a listing of available flow-of-work simulations from major business education publishers.

A. A La Carte Enterprises. New York: Gregg Division, McGraw-Hill Book Company, 1976. For this advanced simulation, a knowledge of shorthand is recommended, but not essential. Students assume jobs within A La Carte Enterprises, a wholesale distributor of grocery products, and in an outside firm which provides data processing, banking, and travel services to A La Carte. The work is designed to consume 45-100 hours.

B. Lester Hill Office Simulation, 2nd Edition. New York: Gregg, Division, McGraw-Hill Book Company, 1979. This simulation accommodates from 8 to 30 students, from 45-90 hours, and can operate as one large office or two or more smaller branches. Lester Hill is a national distributor of hotel and motel supplies which has five departments. Students revolve through these five departments as well as work in a separate firm which handles the data.

C. Mean Jeans Manufacturing Co., A Business Community Simulation. Cincinnati, OH: South-Western Publishing Co., 1983. In this "community" simulation, work flows not only within each business, but from firm to firm. Each of the other 15 firms in the community acts as a supplier of Mean Jeans Manufacturing Company. Students are required to handle the usual business transactions as well as make dcisions regarding personnel, inventory, etc. Mean Jeans accommodates from 11 to 35 students.

D. *Pinetree Fashions*. Cincinnati, OH: South-Western Publishing Co., 1982. *Pinetree Fashions* simulates a wholesale/retail distributor of men's and women's clothing employing from 11 to 21 employees. It advertises these strengths: flexibility in completion time (one quarter, one semester, or even a full year), easy evaluation, and emphasis on employee innovation.

E. *Racquets Unlimited*. Cincinnati, OH: South-Western Publishing Co., 1982. This is a word processing flow-of-work simulation which allows students to build upon their basic skill in word processing. Designed as the sales office of a tennis racquet manufacturing company, the simulation will ideally serve 14 students in 7 positions and will operate approximately 18 hours.

F. *Serendipity, Inc.* Cincinnati, OH: South-Western Publishing Co., 1975. This is advertised as a "short-term" simulation, requiring 30-50 class hours to complete. Students rotate through the 6-10 jobs available in Serendipity, a cosmetic company, or take turns as customers of the firm. The simulation will serve up to 27 students.

G. *Sports Spectrum*, 2nd edition. Cincinnati, OH: South-Western Publishing Co., 1986. In this short-term (50-60 hours) simulation, students assume jobs of employees, management, suppliers and customers of Sports Spectrum, a large wholesale distributor of sporting goods. From 11 to 21 students may participate, rotating through different positions.

NOTES TO THE INSTRUCTOR

In order to present the product-to-client transactions of a business, this unit will be organized as a mini-workflow study. The two companies involved will be called Company A and Company B; students should work in pairs with one student representing the employees of each company. Company A will originate the order; Company B will ship the order; and Company A will receive. It is important that students realize the cyclical nature of this type of work.

You may want to point out that most firms are both purchasers and sellers, both shippers and receivers, during the normal course of business. (Although many firms sell services rather than goods, the invoicing and statement functions are still present.) However, in our isolated examples, Company A only purchases and Company B only sells.

SUGGESTED ACTIVITIES

I. Instructor

A. Before students begin the assignments, the information sheets should be distributed and discussed. Transparency masters are provided for aids in classroom lecture.

B. The instructor should provide copies of the handouts for student use in completing assignments. Each pair of students will need three purchase orders, three purchase requisitions, three invoices, one credit memorandum and three stock requisitions. Also, each student will need one purchase order and one invoice for the posttest.

C. Divide students into pairs. One student will represent Company A; the other, Company B. Each student should individually complete Assignments 1 and 2.

D. You may wish to explain to your class that many firms use equipment to automatically prepare invoices, statements, etc., on continuous forms. However, they can use the assignments in this unit to familarize themselves with the information and format of each form.

II. Student

A. After studying the objectives, learn the terms and information contained on the information sheets.

B. To help study, draw a diagram (flowchart) of the order of each step in the product-to-client transaction.

C. Complete all assignments. Assignments 1 and 2 are done individually. Assignment 3 should be completed with a partner.

D. Take the posttest.

INSTRUCTIONAL MATERIALS

I. Objective Sheets

II. Information Sheets

III. Handouts

1. HO 1: Purchase Requisition
2. HO 2: Purchase Order
3. HO 3: Invoice
4. HO 4: Stock Requisition
5. HO 5: Credit Memorandum
6. HO 6: Bill of Lading

IV. Transparency Masters

1. TM 1: Purchase Requisition
2. TM 2: Purchase Order
3. TM 3: Invoice
4. TM 4: Stock Requisition
5. TM 5: Credit Memorandum
6. TM 6: Bill of Lading

V. Assignment Sheets and Answers

1. AS 1: Learning New Terms
2. AS 2: Learning Related Information
3. AS 3: Completing Forms for Product-to-Client Transactions

VI. Posttest and Key

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INFORMATION SHEET

I. Terms and Definitions

A. **Purchase Requisition**--in-house request form completed by a person who wishes to have an item ordered for a particular department

B. **Purchase Order**--a form sent to a vendor to officially order an item

C. **Invoice**--a form from the vendor indicating an order has been filled

D. **Vendor**--a seller

E. **Call Report**--an in-house form used by salespersons to indicate what action should be taken on an account

F. **Statement**--a form from a vendor showing the beginning balance, the charges and payments made, and the current balance (amount due) on an account

G. **Adjustment Letter**--a letter written from a vendor in answer to a purchaser complaint about an order

H. **Accounts Receivable**--amount owed for goods or services purchased by charge customers

I. **Inventory**--a list of items in stock

J. **Perpetual Inventory System**--a method of stock control in which the record of items in stock is always current as entries are made for each purchase or removal of items

K. **Periodic Inventory System**--a method of stock control in which regular physical counts of items in stock are made in order to determine amount on hand

L. **Stock Requisition**--an in-house form used to request items from inventory

M. **Common Carrier**-- transportation for hire

N. **Air Express**--a way of transporting goods by air

O. **United Parcel Service**--a commercial carrier of packages

P. **Bill of Lading**--a contract between a shipper and carrier

Q. **Credit Memorandum**--a form from the vendor indicating an amount deducted from an account because merchandise was not as ordered

II. Work in Purchasing

A. The department which needs the materials (or the stock clerk in a larger business) completes a PURCHASE REQUISITION. Usually one copy is kept by the requesting department; one by the purchasing department.

B. After finding the best price and service available, the purchasing department prepares a PURCHASE ORDER to be sent to the VENDOR. Copies of the purchase order are kept on file for use in accounting and receiving.

C. Purchase orders are legal contracts and should be prepared carefully. Usually a purchase order is given to the vendor even if the order is first placed by telephone or in person--this confirms the order.

D. Three types of discounts may be offered by the vendor:

1. A quantity discount may be given if a large amount of an item is ordered.

2. A trade discount may be given to a business customer rather than an individual consumer.

3. A cash discount may be given if the bill is paid promptly. Terms such as 2/10, n/30 may be stated. This means that a 2% discount may be taken off the amount owed if the bill is paid within 10 days from the date of the invoice; otherwise, the net amount is due in 30 days.

III. Work in Sales

A. Employees who work for a vendor must have a helpful attitude. If the company does not keep its customers happy, it will not make sales or profits. Therefore, all employees must work to provide good products and good service.

B. In some companies, the salesmen prepare a CALL REPORT each time they contact a customer. The call report is then given to other employees in the company for further action--shipping, accounting, answering questions, etc.

C. If payment is sent with a customer's order, check to see that the amount is correct and then send the check to accounting. If payment is not sent, check to see that credit can be given to the customer before filling the order.

D. An invoice is prepared when an order is filled and all information should be checked for accuracy. When the order is shipped, the invoice is mailed to the customer, and copies are also kept by the shipping, accounting, and sales departments.

E. Although an invoice can be viewed as a bill by the customer, most companies send out a periodic STATEMENT to each customer showing the amount owed. The statement usually shows how much was owed at the beginning of the period, the charges and payments made during the period, and the current balance.

F. The amounts customers owe to your company are called ACCOUNTS RECEIVABLE.

G. If a customer does not receive an order on time, or if the order is damaged or incorrect, a CREDIT MEMORANDUM must be prepared. A copy of the credit memorandum is sent to the customer and a copy sent to accounting so that the customer's account will be properly adjusted.

IV. Work in Shipping

A. When the shipping department receives an invoice for an order to be filled, verify the order with current prices and availability.

B. Prepare a STOCK REQUISITION, including the information from the invoice and also the stock number used in the warehouse. Clerks in the warehouse will send the items to shipping and keep one copy of the stock requisition as a record of the removal of stock from inventory.

C. The goods are prepared for shipping and a CARRIER is chosen.

1. Items can be sent through the U.S. Postal Service by parcel post if they meet size restrictions and if they do not weigh more than 70 pounds.

2. For the fastest commercial service, you may want to use AIR EXPRESS. Air express service usually includes pick-up and delivery.

3. For packages no heavier than 50 lbs., you may use UNITED PARCEL SERVICE. UPS is a carrier of packages and serves all 50 states (partial service only in Alaska and Hawaii).

4. A firm may have its own delivery trucks or may use a COMMON CARRIER trucking service which provides service for hire, locally or long-distance.

5. Large items can be sent by railway freight service although the service is usually slower than other methods. It is also possible to ship packages on most bus lines; this service can be very speedy due to the frequent bus trips between cities.

D. A BILL OF LADING is prepared as the legal contract between the carrier and shipper.

V. Work in Receiving

A. As soon as the order is received, check to make sure it is:

1. Correct
2. Complete
3. Not damaged

B. Be sure the invoice and bill of lading match the original purchase order.

C. If items are missing or damaged, notify the vendor and/or carrier immediately.

VI. Work in Inventory Control

A. Businesses have several types of inventories: office supplies, raw materials needed in production, finished goods ready for sale, janitorial supplies, and forms and supplies needed for customer service.

B. Firms may use computers to keep a constant up-to-the-minute record of items in stock. If the supply of the item gets low, the computer can trigger the reordering process.

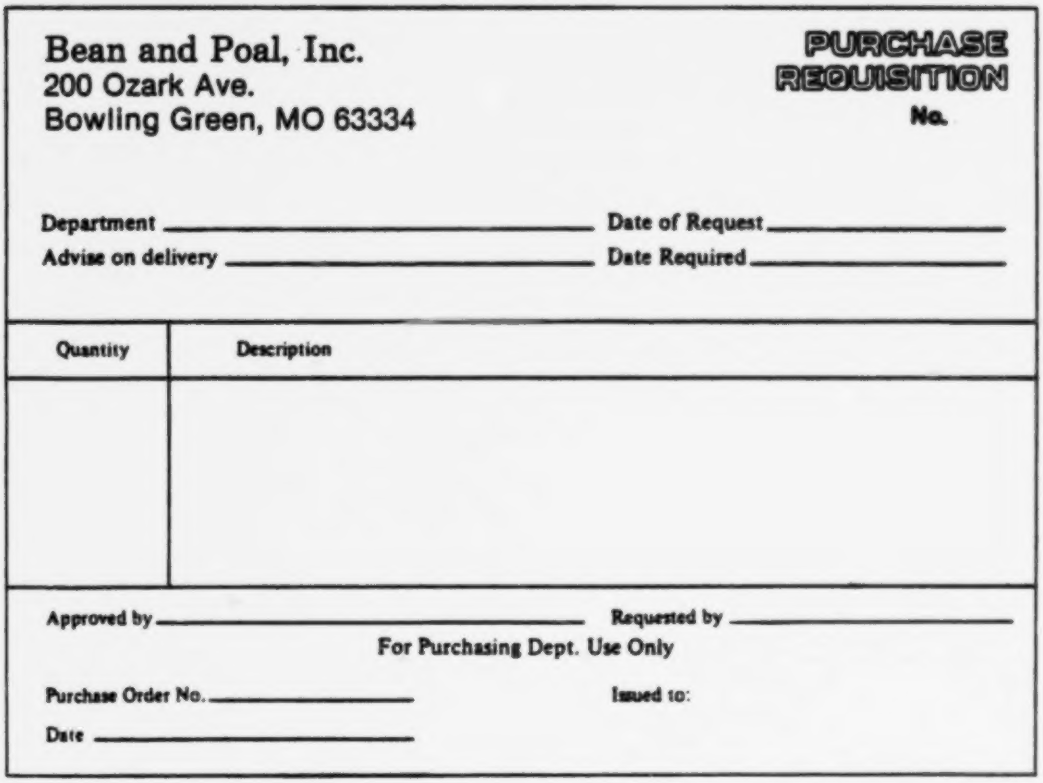
C. One common way to maintain inventory control is to use a PERPETUAL INVENTORY system in which records are changed each time an item is added or removed from stock. If not computerized, a clerk monitors the records to see when items should be reordered.

D. Another common method of inventory control is a PERIODIC INVENTORY system in which a quick physical count is taken at specified times during the year. Items are reordered if needed and records are updated.

E. With any inventory system, most firms require that an annual physical count of the inventory be taken.

HO 1
TM 1

Purchase Requisition



Bean and Poal, Inc.
200 Ozark Ave.
Bowling Green, MO 63334

PURCHASE REQUISITION
No.

Department ____________________ **Date of Request** ____________
Advise on delivery ____________________ **Date Required** ____________

Quantity	Description

Approved by ____________________ **Requested by** ____________

For Purchasing Dept. Use Only

Purchase Order No. ____________ **Issued to:**

Date ____________

HO 2
TM 2

Purchase Order

Purchase Order

TO:

DATE:
ORDER NO.:
SHIP VIA:

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL

Purchasing Agent

HO 3
TM 3

Invoice

House Designs
1001 Broadway
Columbia, Mo. 65201

Invoice

TO:

Date:
Invoice No:
Order No:
Shipped By:
Terms:

QUANTITY	ITEM	UNIT PRICE	TOTAL

HO 4
TM 4

Stock Requisition

DATE: ______

TO: Supply

FROM: ______ PHONE NO. ______ DEPT: ______

AMOUNT NEEDED	FORM NO.	DESCRIPTION

Items will be delivered the same day if the request is received in supply department by 1 p.m.

HO 5
TM 5

Credit Memorandum

CREDIT MEMORANDUM

Progressive Paper Corporation
567 Hartford Ave.
Columbia, Missouri 65203
(314) 442-2883

Sold To:

Date:

No.:

YOUR ACCOUNT HAS BEEN CREDITED FOR:

Quantity	Descriptions	Cat. No.	Unit Price	Amount

Bill of Lading

Shipper's No.____________

Agent's No.____________

RECEIVED, subject to the classifications and tariffs in effect on the date of the issue of this Bill of Lading.

From ________________________, Date____________, 19____

At __________ Street, __________ City, __________ State, __________ Zip, __________ County

the property described below, in apparent good order, except as noted (contents and condition of contents of packages unknown), marked, consigned, and destined as shown below, which said company (the word company being understood throughout this contract as meaning any person or corporation in possession of the property under the contract) agrees to carry to its usual place of delivery at said destination, if on its own railroad, water line, highway route or routes, or within the territory of its highway operations, otherwise to deliver to another carrier on the route to said destination. It is mutually agreed, as to each carrier of all or any of said property over all or any portion of said route to destination, and as to each party at any time interested in all or any of said property, that every service to be performed hereunder shall be subject to all the conditions not prohibited by law, whether printed or written, herein contained, including the conditions on back hereof, which are hereby agreed to by the shipper and accepted for himself and his assigns.

Consigned **TO** ________________________

On Collect on Delivery Shipments, the letters "COD" must appear before consignee's name or as otherwise provided in Item 430, Sec. 1

Destination __________ Street, __________ City,

__________ State, __________ Zip, __________ County

Routing________________________

Delivering Carrier____________ Vehicle or Car Initials__________ No.________

Collect **O**n **D**elivery $__________ and remit to:____________

__________ Street __________ City __________ State,Zip__________

No. Packages	H. M.	DESCRIPTION OF ARTICLES, SPECIAL MARKS, AND EXCEPTIONS	*Weight (Subject to Cor.)	Class or Rate	Check Column

This is to certify that the above named materials are properly classified, described, packaged, marked and labeled and are in proper condition for transportation, according to the applicable regulations of the Department of Transportation.

Signed____________ $____________ per____________

*If the shipment moves between two ports by a carrier by water, the law requires that the bill of lading shall state whether it is carrier's or shipper's weight.

NOTE—Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property.

The agreed or declared value of the property is hereby specifically stated by the shipper to be not exceeding__________ per__________

☐ **C.O.D.** Collect On Delivery

$ ____________

and Remit to Shipper.

C.O.D. Charges to be Paid by

☐ Shipper ☐ Consignee

Subject to Section 7 of conditions, if this shipment is to be delivered to the consignee without recourse on the consignor, the consignor shall sign the following statement:

The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.

____

(Signature of Consignor)

If charges are to be prepaid write or stamp here "To be Prepaid."

Received $____________

to apply in prepayment of the charges on the property described hereon.

____

Agent or Cashier

Per____________

(The signature here acknowledges only the amount prepaid.)

Charges Advanced:

$ ____________

† "The fibre containers used for this shipment conform to the specifications set forth in the box maker's certificate thereon, and all other requirements of Rule 41 of the Uniform Freight Classification and Rule 5 of the National Motor Freight Classification."

† Shipper's imprint in lieu of stamp, not a part of bill of lading approved by the Interstate Commerce Commission.

____________ Shipper, ____________ Agent

Per ____________ Per ____________

Permanent post-office address of shipper,__________ Street, __________ City, __________ State, __________ Zip

519

HO 6
TM 6

Unit XIV - Product-to-Client Transactions

ASSIGNMENT SHEET 1: Learning New Terms

Directions: For each definition in Column 1, choose the best term from Column 2. Write the letter of the term in the blank.

COLUMN 1

__________ 1. A seller

__________ 2. A form from the vendor indicating an amount deducted from your account balance because merchandise was not as ordered

__________ 3. A form from a vendor showing the account balance throughout the period

__________ 4. A form sent to vendor to officially order an item

__________ 5. Transportation for hire

__________ 6. An in-house form used to request items from inventory

__________ 7. A stock of items

__________ 8. A contract between a shipper and carrier

__________ 9. A method of stock control in which the record of items in stock is always current

__________ 10. A form from the vendor indicating an order has been filled

COLUMN 2

A. Bill of lading

B. Common carrier

C. Perpetual inventory system

D. Periodic inventory system

E. Call report

F. Purchase order

G. Purchase requisition

H. Vendor

I. Invoice

J. Inventory

K. Statement

L. Stock requisition

M. Credit memorandum

ASSIGNMENT SHEET 2: Learning Related Information

1. Show the correct order of the steps in product-to-client transactions by numbering each of the following items as they would occur.

_________ A purchase requisition is completed.

_________ A stock requisition is completed.

_________ A bill of lading is prepared.

_________ A carrier is chosen.

_________ A purchase order is sent to vendor.

_________ The inventory card in a perpetual inventory system is updated in the vendor's warehouse.

_________ An invoice is completed.

_________ The items are delivered to the purchaser.

2. Choose the correct term from Column 2 to identify the discount example in Column 1.

		Column 1		Column 2
_________	1.	2/10, net 30	A.	Trade Discount
_________	2.	Although the catalog price of an item is $10, a note in the catalog indicates that all business customers can take a discount of 33 1/3% from catalog prices.	B.	Quantity Discount
			C.	Cash Discount
_________	3.	If the purchaser pays his bill in 15 days from the date of the invoice, he can receive a discount of 2%. Otherwise, the full amount is due at the end of the month.		
_________	4.	If you order 10 dozen or more of an item, you receive a 20% discount.		

3. If you worked in a shipping department, you might have the option of shipping goods on a variety of carriers. List four.

1. ____________________

2. ____________________

3. ____________________

4. ____________________

4. Explain the difference between a perpetual inventory system and a periodic inventory system.

ASSIGNMENT SHEET 3: Completing Forms for Product-to-Client Transactions

Directions: Students should be divided into pairs. One partner should complete Company A's work; the other should complete Company B's work. Both students should pay close attention to the flow of work as the transactions are completed--notice which company begins the work, how it progresses, and which company finalizes the transaction. Also, both students should familiarize themselves with the forms used in every step since the test requires you to complete forms from each company.

I.

COMPANY A

1. Complete a purchase requisition for the following:

   A request from the Manufacturing Department dated January 16 of the current year and needed by February 28 of the current year. The person to contact when it arrives is A. Baker.
   - Six rolls of corrugated paper, 25#, at $6.15 per roll
   - 100 No. 6 wire fasteners at $.28 each
   - 5 dozen boxes of No. 8 staples at $5.80 per box

2. Prepare Purchase Order 8442 from Company B, 123 Main Street, Your Town for this requisition. Company B allows a trade discount of 20%.

COMPANY B

3. Prepare a stock requisition for these items to complete Company A's P.O. 8442

4. All items are in stock and arrive at your shipping department. Prepare Invoice No. 0636, showing that the order was filled on January 30, was shipped by Davis Bros. Truck Company, and has terms of 2/10, n/30.

5. When you receive the goods, you notice that only 80 No. 6 wire fasteners are received. You phone Company B, informing them of this shortage.

6. Complete a credit memorandum for the 20 wire fasteners. On the credit memorandum be sure to adjust the amount for the 20% trade discount that was allowed on the order.

II. Follow the same steps as in Part I, substituting the following information.

1. The purchase requisition should be completed on a request from the Accounting Department dated January 17 and needed by January 30. The person to contact when the items arrive is S. Olson.

    - 3 reams of letterhead stationery at $8.75 per ream
    - 3 boxes of letterhead envelopes at $10 per box
    - 2 dozen rolls of adding machine tape, 2 1/4", at $5.28 per dozen
    - 10 boxes paper clips, No. 8, at $.73 per box

2. Order these items from Company B, Office Supply Division, on Purchase Order 8451. No trade discount is allowed on office supplies.

3. Same as above.

4. The letterhead stationery and envelopes must be specially printed. Show them on the invoice as "will be sent later" and no amount. (Another invoice would have to be completed later when they were ready.) Complete the invoice for the remaining items. Carrier is UPS, terms are 2/10, n/30. Invoice No. 0683, invoice completed on January 21.

5. All items shipped were received.

6. No credit memorandum needed.

III. Follow the same steps as in Part I, substituting the following information.

1. The purchase requisition should be completed on a request from Manufacturing Department, dated January 18 and needed by February 20. The person to contact when it arrives is A. Baker.

   - 6 50-lb. bags tri-phosphate mix, No. 301, at $51.30 per bag
   - 30 gal. No. 8 red dye, at $7.85 per gallon
   - 40 10-lb. packs of No. 3 elastic rings, at $2.50 per pack
   - 1 dozen packs of blank labels at $4.39 per pack.

2. Order from Company B, Purchase Order No. 8462.

3. Same

4. All items are in stock. Prepare Invoice No. 0710. Terms 2/10, n/30. Carrier is Davis Bros. Truck Company. Order was filled on January 30.

5. All items shipped were received.

6. No credit memorandum needed.

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet 1:

1.	Vendor	(H)
2.	Credit memorandum	(M)
3.	Statement	(K)
4.	Purchase order	(F)
5.	Common carrier	(B)
6.	Stock requisition	(L)
7.	Inventory	(J)
8.	Bill of lading	(A)
9.	Perpetual inventory system	(C)
10.	Invoice	(I)

Assignment Sheet 2:

1. __1__ A purchase requisition is completed.
   __3__ A stock requisition is completed.
   __7__ A bill-of-lading is prepared.
   __5__ A carrier is chosen.
   __2__ A purchase order is sent to vendor.
   __4__ The inventory card in a perpetual inventory system is updated in the vendor's warehouse.
   __6__ An invoice is completed.
   __8__ The items are delivered to the purchaser.

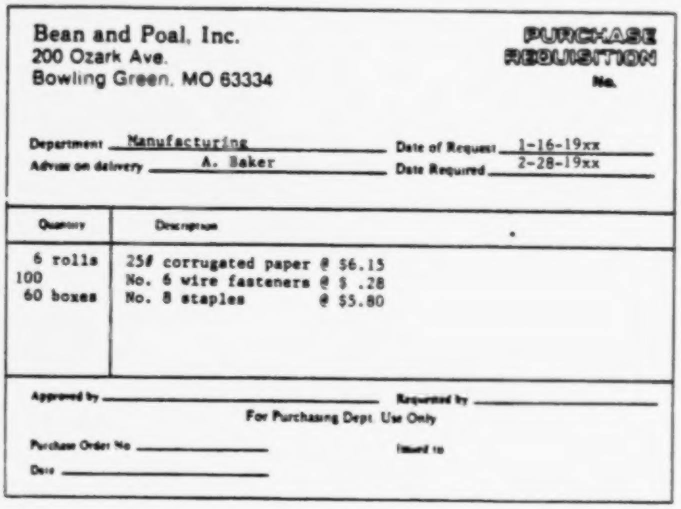
2. 1. Cash (C)
   2. Trade (A)
   3. Cash (C)
   4. Quantity (B)

3. Any four of the following:

   1. United Parcel Service
   2. U.S. Postal Service (Parcel Post)
   3. Air express
   4. Railway freight
   5. Bus lines
   6. Common Carrier trucks
   7. Trucks owned by the business

4. In a perpetual inventory system, records are updated immediately for every removal or purchase of stock; in a periodic system, records are updated after regular physical counts (every 2-4 weeks usually).

Assignment Sheet 3:



Bean and Poal, Inc.
200 Ozark Ave.
Bowling Green, MO 63334

PURCHASE REQUISITION
No.

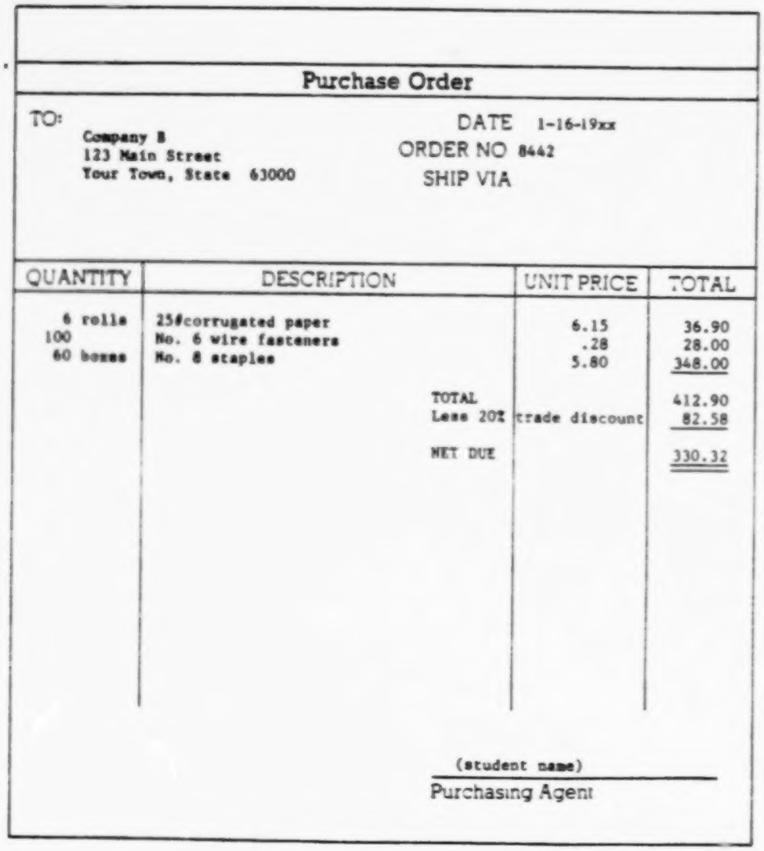
Department Manufacturing
Date of Request 1-16-19xx
Advise on delivery A. Baker
Date Required 2-28-19xx

Quantity	Description
6 rolls	25# corrugated paper @ $6.15
100	No. 6 wire fasteners @ $ .28
60 boxes	No. 8 staples @ $5.80

Approved by
Requested by

For Purchasing Dept. Use Only

Purchase Order No
Issued to
Date



Purchase Order

TO:
Company B
123 Main Street
Your Town, State 63000

DATE 1-16-19xx
ORDER NO 8442
SHIP VIA

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
6 rolls	25#corrugated paper	6.15	36.90
100	No. 6 wire fasteners	.28	28.00
60 boxes	No. 8 staples	5.80	348.00
	TOTAL		412.90
	Less 20%	trade discount	82.58
	NET DUE		330.32

(student name)
Purchasing Agent

Stock Requisition

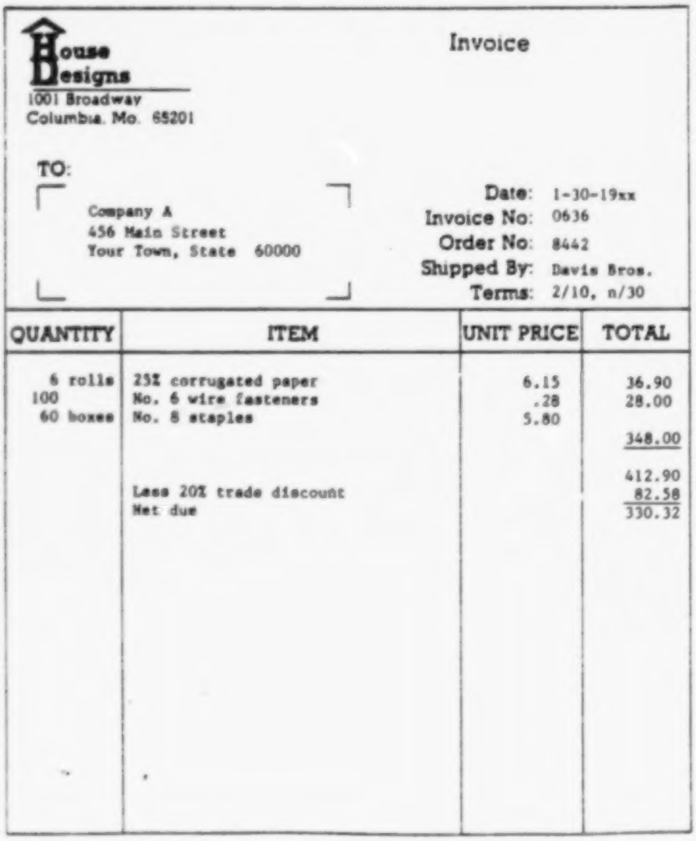
DATE: ____________

TO: Supply

FROM: (Student Name) PHONE NO. ________ DEPT: Shipping

AMOUNT NEEDED	FORM NO.	DESCRIPTION
6 rolls		25# corrugated paper
100		No. 6 wire fasteners
60 boxes		No. 8 staples

Items will be delivered the same day if the request is received in supply department by 1 p.m.



House Designs
1001 Broadway
Columbia, Mo. 65201

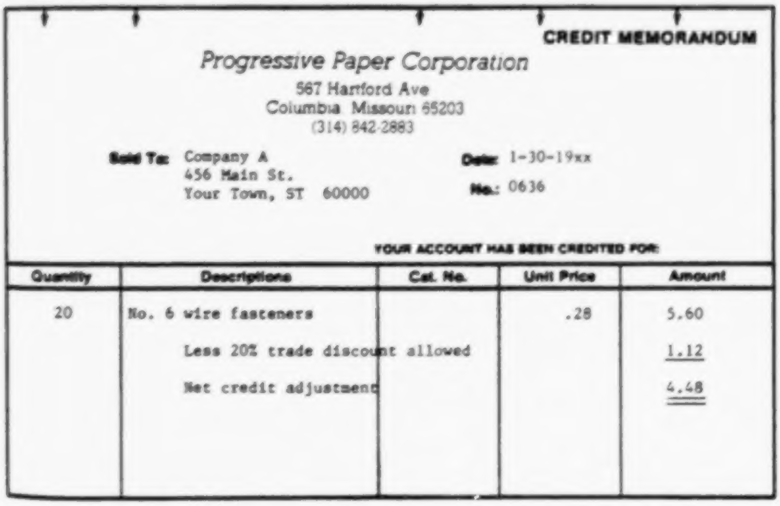
Invoice

TO:

Company A
456 Main Street
Your Town, State 60000

Date: 1-30-19xx
Invoice No: 0636
Order No: 8442
Shipped By: Davis Bros.
Terms: 2/10, n/30

QUANTITY	ITEM	UNIT PRICE	TOTAL
6 rolls	25% corrugated paper	6.15	36.90
100	No. 6 wire fasteners	.28	28.00
60 boxes	No. 8 staples	5.80	
			348.00
			412.90
	Less 20% trade discount		82.58
	Net due		330.32



CREDIT MEMORANDUM

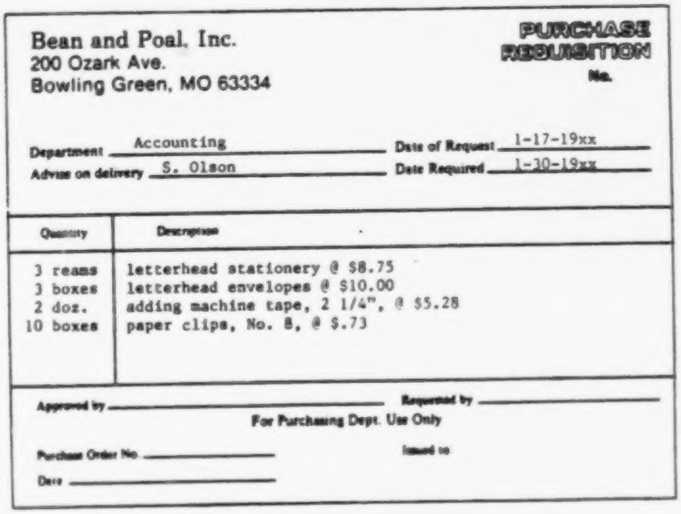
Progressive Paper Corporation
567 Hartford Ave
Columbia Missouri 65203
(314) 842-2883

Sold To: Company A
456 Main St.
Your Town, ST 60000

Date: 1-30-19xx
No.: 0636

YOUR ACCOUNT HAS BEEN CREDITED FOR:

Quantity	Descriptions	Cat. No.	Unit Price	Amount
20	No. 6 wire fasteners		.28	5.60
	Less 20% trade discount allowed			1.12
	Net credit adjustment			4.48



Bean and Poal, Inc.
200 Ozark Ave.
Bowling Green, MO 63334

PURCHASE REQUISITION
No.

Department Accounting **Date of Request** 1-17-19xx
Advise on delivery S. Olson **Date Required** 1-30-19xx

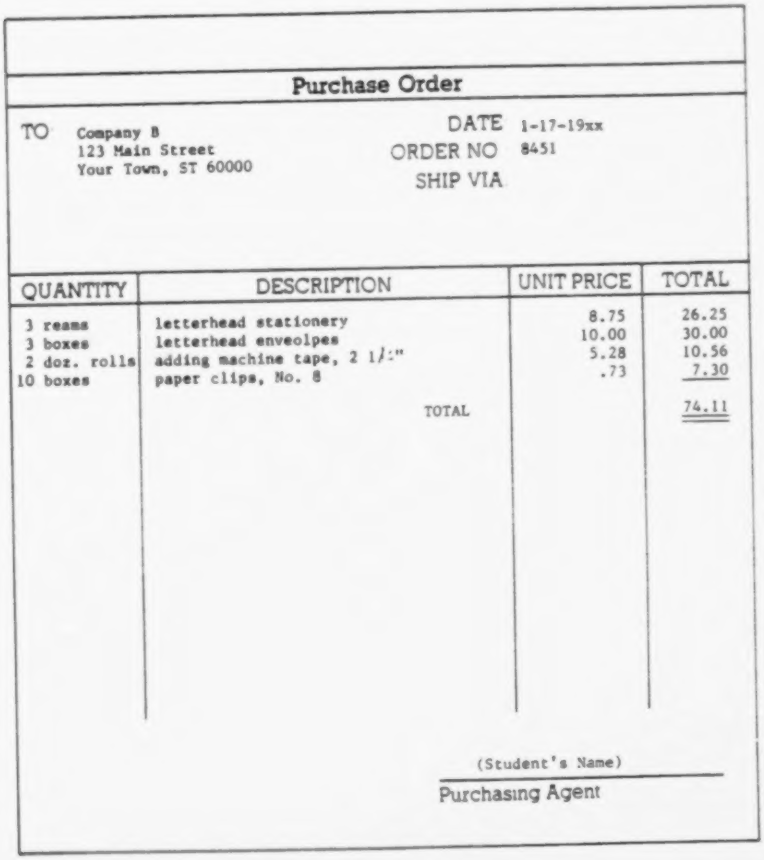
Quantity	**Description**
3 reams	letterhead stationery @ $8.75
3 boxes	letterhead envelopes @ $10.00
2 doz.	adding machine tape, 2 1/4", @ $5.28
10 boxes	paper clips, No. 8, @ $.73

Approved by ______ **Requested by** ______

For Purchasing Dept. Use Only

Purchase Order No. ______ **Issued to**

Date ______



Purchase Order

TO Company B
123 Main Street
Your Town, ST 60000

DATE 1-17-19xx
ORDER NO 8451
SHIP VIA

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
3 reams	letterhead stationery	8.75	26.25
3 boxes	letterhead enveolpes	10.00	30.00
2 doz. rolls	adding machine tape, 2 1/:"	5.28	10.56
10 boxes	paper clips, No. 8	.73	7.30
	TOTAL		74.11

(Student's Name)
Purchasing Agent

Stock Requisition

DATE: 1-18-19xx

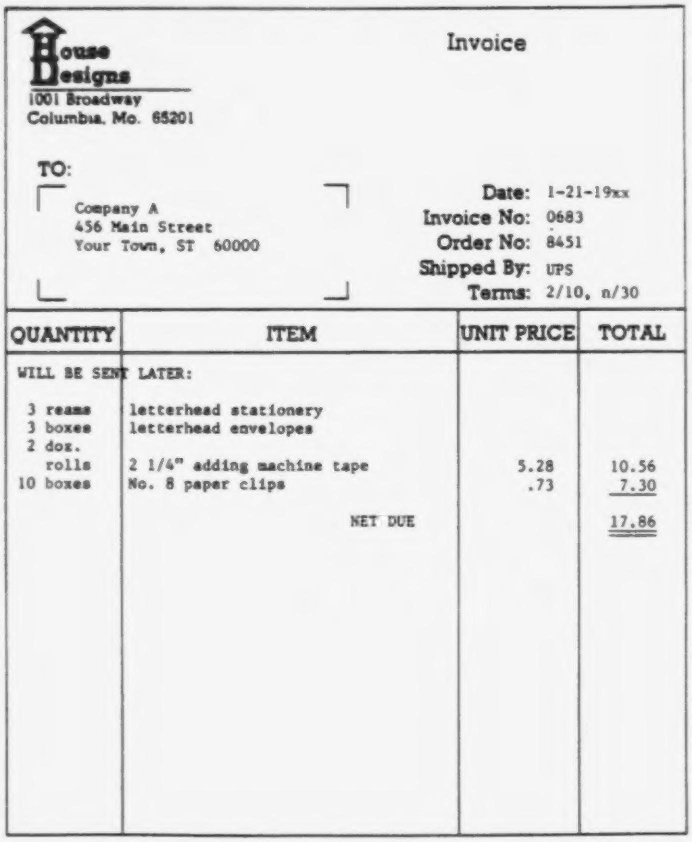
TO: Supply

FROM: (Student's Name) PHONE NO. ________ DEPT: Shipping

AMOUNT NEEDED	FORM NO.	DESCRIPTION
3 reams		letterhead stationery (for Company A)
3 boxes		letterhead envelopes (for Company A)
2 doz. rolls		2 1/4" adding machine tape
10 boxes		No. 8 paper clips

Items will be delivered the same day if the request is received in supply department by 1 p.m.

424



House Designs
1001 Broadway
Columbia, Mo. 65201

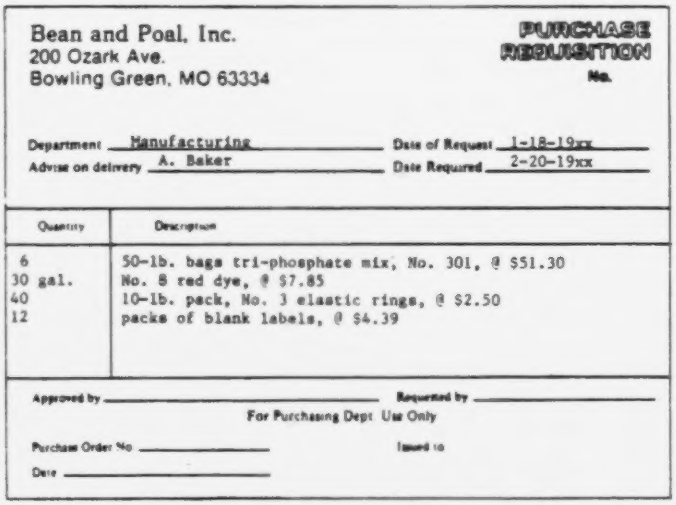
Invoice

TO:

Company A
456 Main Street
Your Town, ST 60000

Date: 1-21-19xx
Invoice No: 0683
Order No: 8451
Shipped By: UPS
Terms: 2/10, n/30

QUANTITY	ITEM	UNIT PRICE	TOTAL
WILL BE SENT LATER:			
3 reams	letterhead stationery		
3 boxes	letterhead envelopes		
2 doz. rolls	2 1/4" adding machine tape	5.28	10.56
10 boxes	No. 8 paper clips	.73	7.30
	NET DUE		17.86



Bean and Poal, Inc.
200 Ozark Ave.
Bowling Green, MO 63334

PURCHASE REQUISITION

No.

Department Manufacturing
Date of Request 1-18-19xx
Advise on delivery A. Baker
Date Required 2-20-19xx

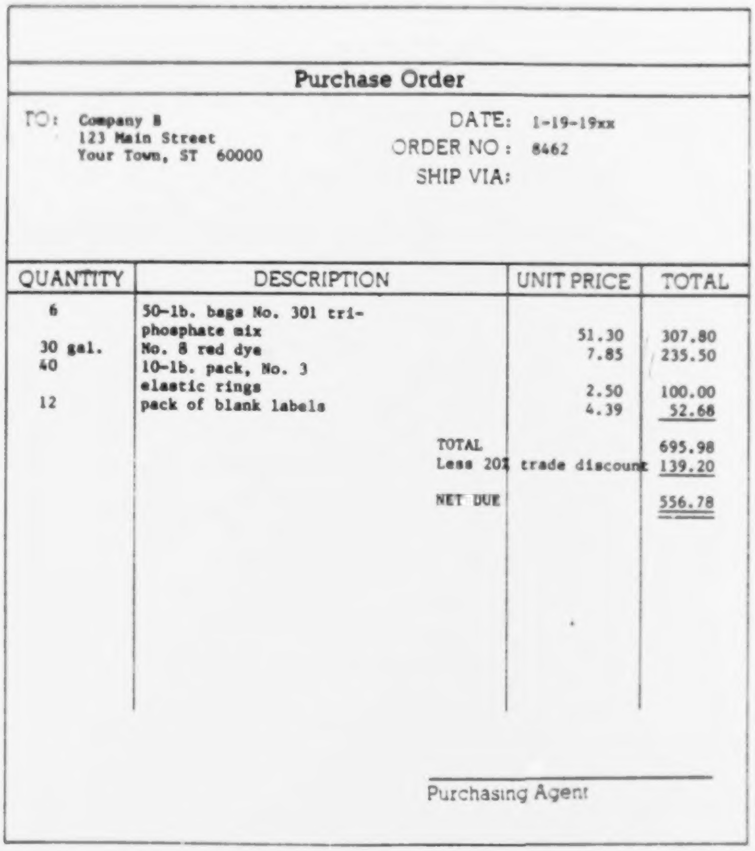
Quantity	Description
6	50-lb. bags tri-phosphate mix, No. 301, @ $51.30
30 gal.	No. 8 red dye, @ $7.85
40	10-lb. pack, No. 3 elastic rings, @ $2.50
12	packs of blank labels, @ $4.39

Approved by ____________ Requested by ____________

For Purchasing Dept Use Only

Purchase Order No ____________ Issued to

Date ____________



Purchase Order

TO: Company B
123 Main Street
Your Town, ST 60000

DATE: 1-19-19xx
ORDER NO : 8462
SHIP VIA:

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
6	50-lb. bags No. 301 triphosphate mix	51.30	307.80
30 gal.	No. 8 red dye	7.85	235.50
40	10-lb. pack, No. 3 elastic rings	2.50	100.00
12	pack of blank labels	4.39	52.68
	TOTAL		695.98
	Less 20% trade discount		139.20
	NET DUE		556.78

Purchasing Agent

Stock Requisition

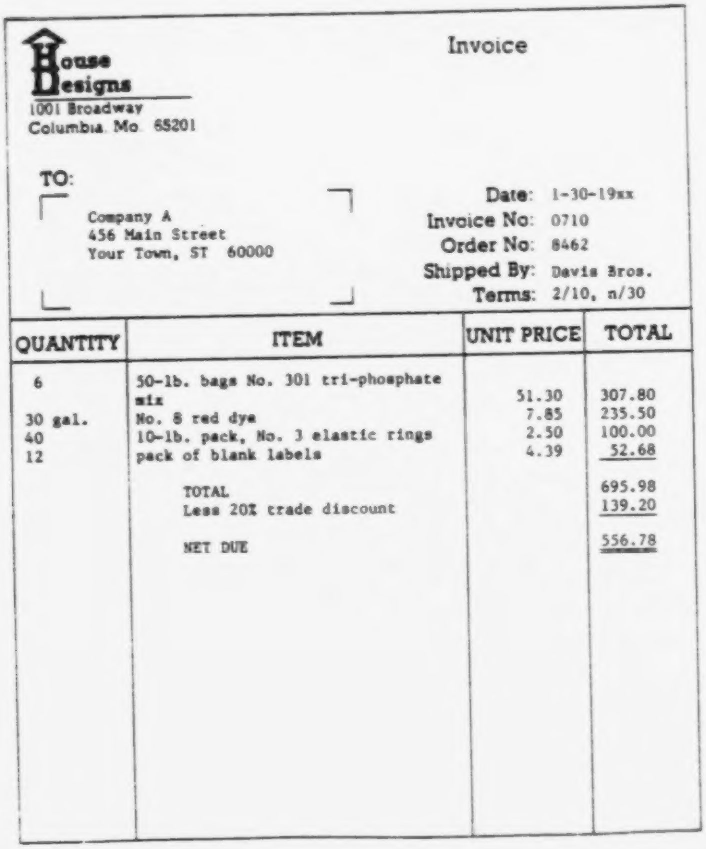
DATE: 1-21-19xx

TO: Supply

FROM: (Student's Name) PHONE NO. ______ DEPT: Shipping

AMOUNT NEEDED	FORM NO.	DESCRIPTION
6		50-lb. bags No. 301 tri-phosphate mix
30 gal.		No. 8 red dye
40		10-lb. pack, No. 3 elastic rings
12		packs, blank labels

Items will be delivered the same day if the request is received in supply department by 1 p.m.



House Designs
1001 Broadway
Columbia, Mo. 65201

Invoice

TO:

Company A
456 Main Street
Your Town, ST 60000

Date: 1-30-19xx
Invoice No: 0710
Order No: 8462
Shipped By: Davis Bros.
Terms: 2/10, n/30

QUANTITY	ITEM	UNIT PRICE	TOTAL
6	50-lb. bags No. 301 tri-phosphate mix	51.30	307.80
30 gal.	No. 8 red dye	7.85	235.50
40	10-lb. pack, No. 3 elastic rings	2.50	100.00
12	pack of blank labels	4.39	52.68
	TOTAL		695.98
	Less 20% trade discount		139.20
	NET DUE		556.78

POSTTEST

I. Choose one of the following terms to complete each statement.

Invoice	Trade Discount
Statement	Cash Discount
Inventory	Quantity Discount
Account Receivable	Credit Memorandum
Purchase Requisition	Perpetual Inventory System
Purchase Order	Periodic Inventory System
Bill of Lading	
Common Carrier	
Air Express	

1. At the XYZ Company, warehouse workers actually count the items on the shelves every two weeks; then they prepare a purchase requisition if any items are needed. This is an example of a ______________________________ system.

2. The Acme Truck Company hauls goods long distance for anyone who hires them; Acme is an example of a ______________________________.

3. If you receive a form from Company C showing that your current balance is $25, you have received a ______________________________ of your account with Company C.

4. One item in your recent order from 123 Company was damaged. When you told them, 123 Company sent you a form showing that they had adjusted your account for the price of the damaged item. The form you received was a ______________________________ .

5. The contract between a shipper and a carrier is called a ______________________________ .

6. To ship goods by the fastest commercial service, you would use ______________________________ .

7. Because you paid your bill within 10 days from the invoice date, you received a 5 percent discount on the amount due. This is an example of a ______________________________ .

8. The cycle of product-to-client transactions begins when a person or department which wishes to order an item completes a ______________________________ .

9. A business may have many types of items in stock (finished goods, raw materials, office supplies, etc.); these items are called ______________________________ .

10. A vendor completes this form to show that an order has been filled: ______________________________ .

II. Complete a purchase order and invoice using the following information:

Purchase Order: No. 0836

Date: February 4, 19--

To: Company B
123 Main Street
Your Town, State, Zip

For: 6 Tire stress gauges, $8.50 each
2 pressure regulators, $42.00 each

Include: a 15% discount because you are a business customer

Invoice No. 3384

Date: February 14, 19--

Carrier: UPS

Terms: Net 30

To: Company A
789 Sixth Avenue
Your Town, State, Zip

All items ordered are shipped

POSTTEST KEY

I. 1. Periodic inventory system
2. Common carrier
3. Statement
4. Credit memorandum
5. Bill of lading
6. Air express
7. Cash discount
8. Purchase requisition
9. Inventory
10. Invoice

II.

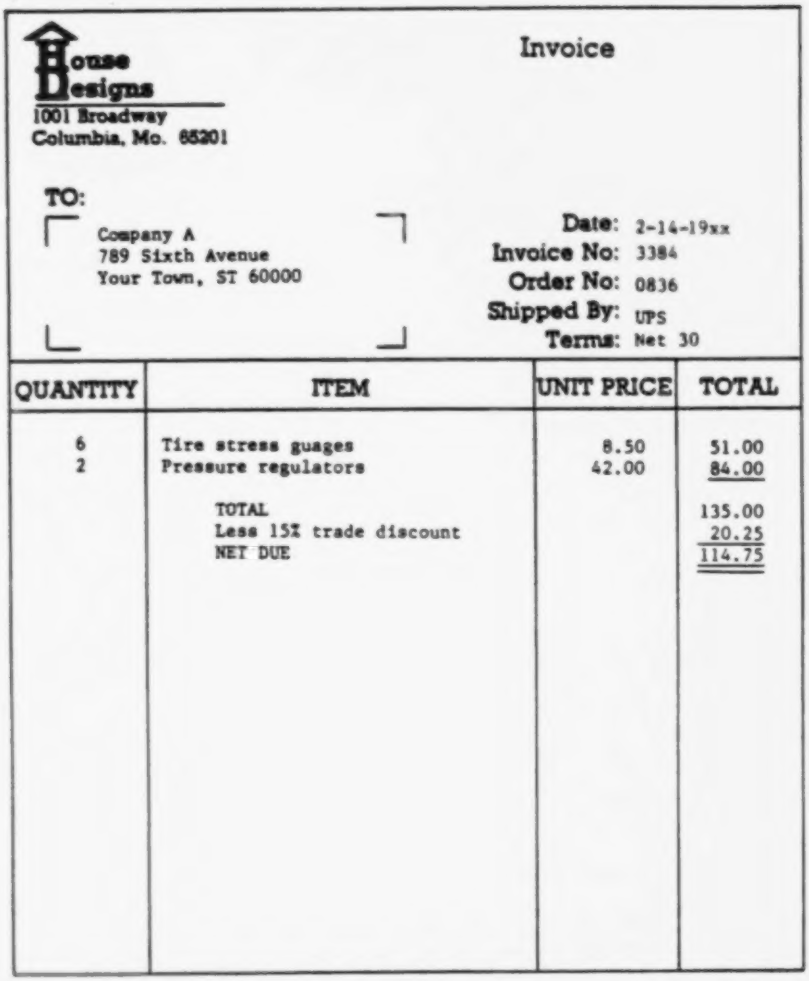
Purchase Order

TO:
Company B
123 Main Street
Your Town, ST 60000

DATE: 2-4-19xx
ORDER NO.: 0836
SHIP VIA:

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
6	Tire stress guages	8.50	51.00
2	Pressure regulators	42.00	84.00
	TOTAL		135.00
	Less 15% trade discount		20.25
	NET DUE		114.75

Student Name
Purchasing Agent



House Designs

1001 Broadway
Columbia, Mo. 65201

Invoice

TO:

Company A
789 Sixth Avenue
Your Town, ST 60000

Date: 2-14-19xx
Invoice No: 3384
Order No: 0836
Shipped By: UPS
Terms: Net 30

QUANTITY	ITEM	UNIT PRICE	TOTAL
6	Tire stress guages	8.50	51.00
2	Pressure regulators	42.00	84.00
	TOTAL		135.00
	Less 15% trade discount		20.25
	NET DUE		114.75